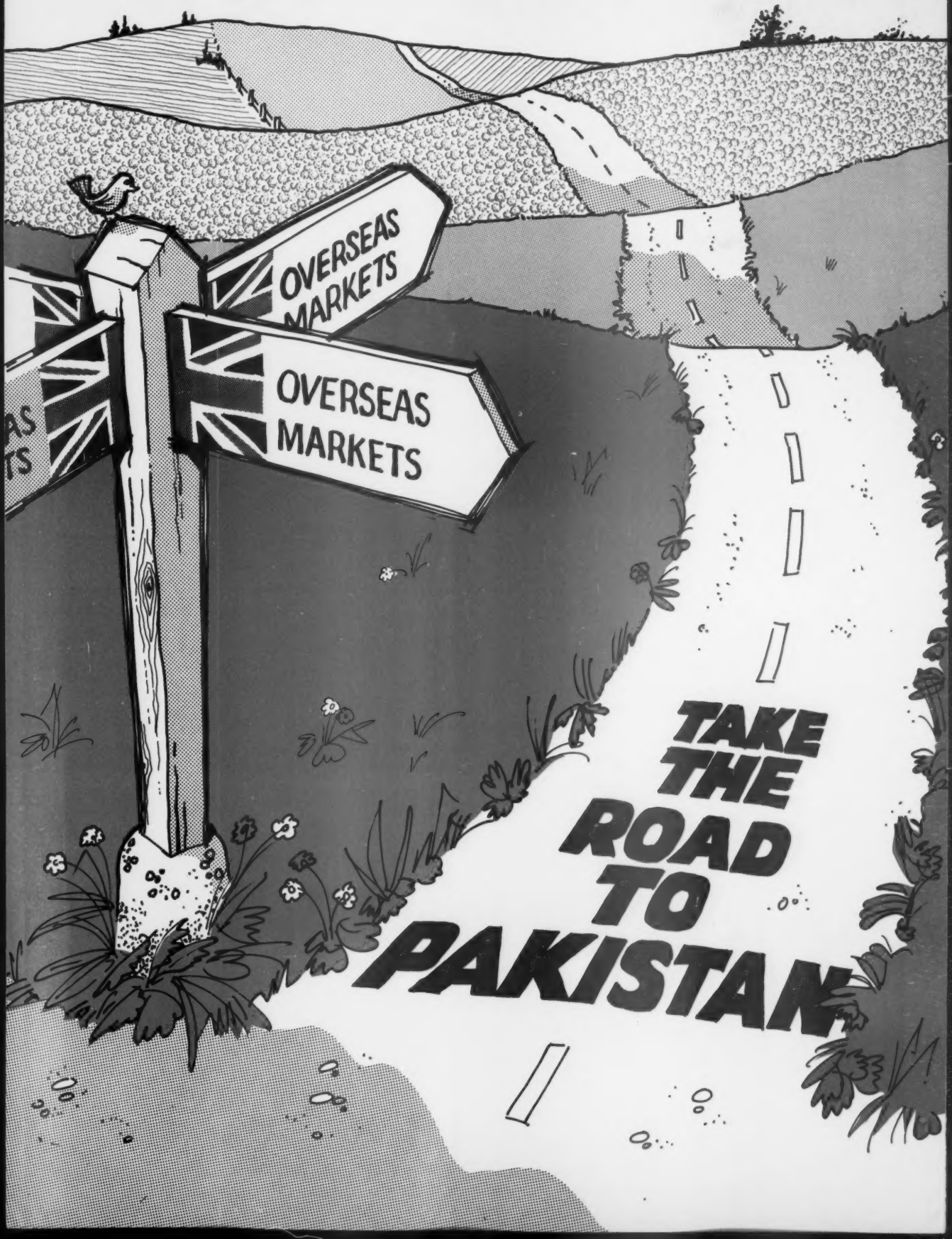
Trade and Industry

29 September 1978 Every Friday 40p



ad rates

Trade and Industry

ABC Member of the Audit Bureau of Circulations

Advertisement department 13 Great James Street, London WC1N 3DP, tel. 01-242 9478

mechanical data

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Copy dates for display
Black and white – 14 days prior to publication
Colour – 21 days prior to publication

Copy date for classified
Monday same week of publication

Agency commission – 10%
All advertisements are subject to space being available.

display

Rate per insertion

	Whole page 266 × 190 mm	**Half page** 266 × 92 mm or 130 × 190 mm	**Third page** 266 × 61 mm or 90 × 190 mm	**Quarter page** 130 × 92 mm or 63 × 190 mm
1 insertion	£295	£155	£106	£81
6 insertions	£282	£148	£100	£78
13 insertions	£268	£141	£96	£75
26 insertions	£255	£134	£91	£73
52 insertions	£241	£128	£87	£70

Double page spread: **£536** *per insertion (series:* 6 insertions, **£510** per insertion; 13, **£483** per insertion; 23, **£456** per insertion; 52, **£430** per insertion)

Special positions: 15% extra on space charge **Outside back cover:** 20% extra on space charge

Colour: *Standard colours* **£81** *per colour extra. Special colours* **£121** *per colour extra.*

Full colour: £242

Bleed: 10% extra on space charge. Bleed page size 303 mm × 215 mm. Trim size 295 mm × 210 mm.

Inserts: *Preprinted loose inserts accepted by arrangement*

classified

Recruitment

Boxed and semi-display single column centimetre **£3.50** (minimum 3 cm)
Box number £1 *extra*

Trade • Industrial • Services section

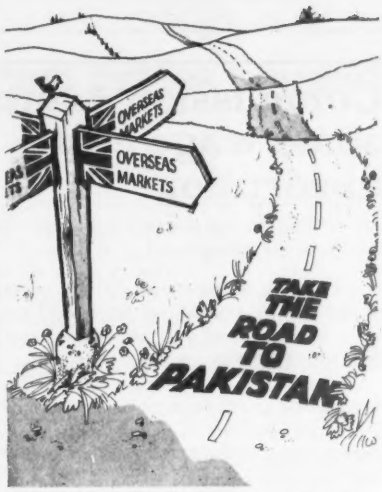
Boxed: **£3.50** single column centimetre (minimum 2.5 cm)
Series discounts:
13 insertions 10% 26 insertions at 15% 52 insertions at 20%
Four columns per page:
Single column width 44 mm Double column width 92 mm Triple column width 140 mm
Page width 190 mm Page depth 266 mm

Advertisement director: Dudley Masters
Advertisement manager: Terry Day
Northern executive: Allan Loftus (tel. 061-766 2191)

Trade and Industry

29 September 1978

News from the Departments of Industry · Trade · Prices & Consumer Protection



In spite of a 30 per cent increase in UK exports, Pakistan is a market that should attract greater attention from British exporters. Our market report (page 720) signposts the opportunities.

Trade and Industry

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Volume 32 no. 13

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ABC Member of the Audit Bureau of Circulations
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Trade and Industry this week

HOME

Statutory control needed for advertisements – Hattersley

New powers for the Advertising Standards Authority (ASA) ought to include the ability to instruct an 'offending advertiser' to exhibit an advertisement which corrects his previous deception. This should be an advertisement of equal size, displayed with equal prominence, at the advertiser's expense – the content of which should be dictated by the ASA in the public interest.

That was the view expressed by Roy Hattersley, Secretary of State for Prices and Consumer Protection, at the National Co-operative Drapery and Fashion Managers' Association national conference at Bournemouth, on Monday. He said that, although the ASA discharged its duty to keep advertising legal, decent, honest and truthful with speed and success, the present system had weaknesses.

Not enough regulation

Voluntary regulation of advertising was not enough, he added. The time had come to consider some application of statutory control to the supervision of printed advertising. Statutory backing for the work already done by the Advertising Standards Authority would 'enable us to pursue the uncooperative minority of advertisers and to prohibit the continued display of their unacceptable advertisements'.

Mr Hattersley pointed out that the advertising industry had much to gain from a statutory long-stop which obliged a recalcitrant minority of advertisers – whose actions brought the industry into disrepute – to honour codes of conduct that most advertisers willingly accepted.

He said that he ought to warn the ASA 'that once armed with the back-stop of statutory powers I would hope to heap other burdens on it – not least the duty to pay more regard than has been possible in the past to the concept of social responsibility in advertisements. I think particularly of advertisements directed at especially vulnerable or susceptible groups'.

Mr Hattersley said he hoped 'that we can begin at once to consider this extended role for the ASA. I hope too that we can at least begin to think of the wider implications of advertising's effect on the economy, for the economic and social consequences of an improper use of advertising are matters inevitably outside the remit of the ASA, and cannot be covered by the simple creation of legal sanctions to support existing codes of practice – or even wide-ranging extensions of them. Yet the economic consequences of advertising can be damaging and can be severely so.'

Describing some circumstances in which advertising could 'do substantial damage to the competitive efficiency of the mixed economy,' Mr Hattersley added: 'For the time being I intend to leave the problem squarely with the Advertising Association.'

Commission wants some wage cost absorption

Firms seeking to recover all the cost of wage settlements by putting up prices will come under the scrutiny of the Price Commission in the coming months.

Chairman Charles Williams said on Tuesday that the commission would be looking for 'increasing efficiency in cost absorption' when considering price increases justified by reference to cost recovery.

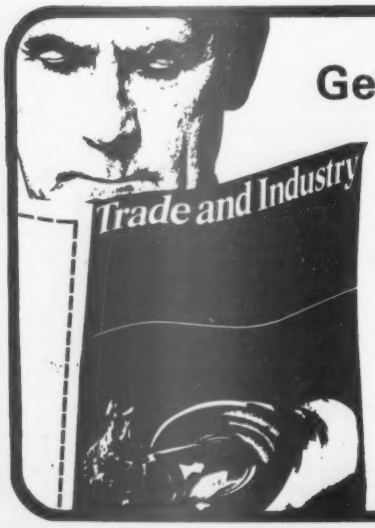
'We are likely to be particularly concerned in cases where wage settlements have given rise to large increases in unit labour costs which are then used as the basis for price increases,' he said.

Mr Williams was speaking at a press conference on the commission's quarterly report for 1 May to 31 July.

Since last August, the commission has initiated 32 investigations of price increases, prices or margins, and conducted 15 examinations of sectors of trade or industry.

Guided by criteria

In all cases, the commission has been guided by the criteria set out in section 2 of the Price Commission Act 1977. Although all the criteria have influenced the commission's selection of investigations and conduct of examinations, it has concentrated particularly on the competition criterion.



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'In a sense,' the report says, 'it underpins all the others in that the very existence of a competitive market for goods or services exercises the greatest pressure to achieve the most efficient use of inputs, to obtain reductions in costs, to achieve innovations or improvements in quality and, above all, to satisfy the demands and interests of users.

'We have noted in the year that has passed, as our predecessors noted before us, how many sectors fail to achieve or sometimes even resemble the fully competitive model.'

Post prices pegged

The present freeze on charges for main postal and telecommunications services until the end of the year is to be extended for at least a further three months.

This decision by the Post Office, announced on Tuesday, means that, by April next, postal rates will not have changed for 21 months and charges for telecommunications will have remained stable for three and a half years.

Growth in tourism slackening?

Jubilee year was , in general, a period of great growth in inward tourism to Britain but, towards the end of the year that rate of growth showed signs of slackening, especially from the northern European markets. This is one of the findings in the British Tourist Authority's annual report for the year ended 31 March 1978, published on 25 September.

Several reasons for slower growth were apparent, the report continues: world economic conditions were far from buoyant; hardening of the pound had also made British prices less competitive, Britain could no longer be quite so truly described as the bargain basement of Europe; and constraints were growing as more countries were imposing restrictions on travel.

Post-war success

But, says the BTA, potential for travel to Britain was good, although growth was an opportunity and not a certainty. Because the development of tourism to Britain had been one of this country's major post-war success stories, the delusion could gain currency that growth was self-generating. It was not. The growth that had happened had been the result of hard work, a wide knowledge and careful appraisal of the world market and imaginative and aggressive overseas marketing. Continuance of growth would depend upon fulfilment of a number of requirements.

The report stressed that Britain must offer good value for money and guard its standards of service. At present, the country enjoyed a good reputation for both value and quality of service. Statistics on tourism in the UK in 1977 were given in *Trade and Industry*, 8 September.

Unemployment down

Unemployment in Great Britain fell by 14 200 to 1 316 700, excluding school leavers, according to seasonally adjusted figures for mid-September, released by the Department of Employment on Tuesday.

In the last three months, there has been an average increase in unemployed of 4000 per month.

Seasonally adjusted figures for the number of vacancies notified to employment offices in Great Britain was 217 300, an increase of 9600 since August.

OVERSEAS

New Chinese ambassador

Ke hua, new ambassador of the People's Republic of China, calls on Edmund Dell, Secretary of State for Trade. The picture was taken in Mr Dell's office on Monday.

Top shipbuilders to visit China

A top-level team from British Shipbuilders, led by chairman Admiral Sir Anthony Griffiths, is visiting Peking on 3 October for two weeks, at the invitation of the Chinese shipbuilding industry. The visit follows the recent trip to China by trade secretary Edmund Dell. British Shipbuilders says that the mission will provide an excellent opportunity for closer co-operation in shipbuilding technology, particularly in merchant shipbuilding and offshore developments.

Director general for Saudi-British office

Barry Lello has been appointed by the Department of Trade as director general of the Saudi-British Economic Co-operation Office in Riyadh. He succeeds Peter Corley who has returned to the department. Mr Lello, an assistant secretary in the department, served in the Middle East as civil air attaché from 1971 to 1975.

The office in Riyadh was set up under the auspices of the Saudi-British Joint Economic Commission and facilitates day-to-day contact with Saudi Arabian government departments and public authorities located in Riyadh. Mr Lello will be able to offer advice and assistance to British businessmen visiting Riyadh, particularly those wishing to call upon sector organisations.

EUROPE

Trade mission visits China

A high-level EEC mission opened trade talks with China on Monday (25 September). The delegation, led by EEC vice-president Wilhelm Haferkamp, is discussing the expansion of two-way trade between the EEC and China following the signing, earlier this year, of a five-year trade agreement.

The delegation will spend about 10 days in China following the signing, earlier this year, of a five-year trade agreement.

The EEC team includes senior representatives from the engineering, oil, banking and steel industries.

Britain has two representatives in the delegation, Sir Peter Tennant of Barclays Bank International and Mr J. E. Williams, deputy chairman of Foster Wheeler.

Public works contracts

Details of a new EEC directive raising the threshold at which public sector works contracts must be advertised in the EEC *Official Journal* are set out in a joint circular, published on Monday by the Department of the Environment and the Welsh Office.

The circular gives details of a change in the monetary unit of account for EEC purposes. As a result, local authority works contracts will not have to be advertised in the *Official Journal* if they are estimated to cost less than £660,000; previously the threshold was £415,000. The threshold is to be recalculated every two years to ensure that a realistic figure is maintained.

The directive, which is operative from 2 February 1979, is the first change in the threshold since 1973. Other procedures for advertising and awarding contracts in the EEC remain the same.

Chairmen and Managing Directors

The following executives are seeking to further their careers within fields where proven experience counts and is rewarded accordingly

FINANCE

1. **Business Analyst part** ACMA. A tough hardworking technical cost accountant with large manufacturing group experience. Seeks career development in anticipation of completing his exams shortly.
Age 27 Salary £8,000
2. **Financial Manager** ACA with major international manufacturing group experience covering systems and treasury as well as financial management. Seeking further career development.
Age 29 Salary £10,000
3. **Financial Controller.** BSc ACCA. A widely travelled manager with particular knowledge of computer software and Advertising Agency work. Location very flexible.
Age 31 Salary c. £10,000
4. **Finance Director** ACA J. Dip MA. A most likeable and successful 'high-flyer' with notable company doctoring experience in both the service and manufacturing industries. Seeks greater line management responsibility with career development potential.
Age 30 Salary c. £15,000
5. **Finance Manager.** ACCA MBA. Deputy to F/D of major manufacturing group with responsibility for numerous subsidiaries and involving some merchant banking and cash and treasury management now seeks career development with long-term potential.
Age 33 Salary £12,500+
6. **Financial Manager.** ACA. With major manufacturing company experience covering technical and analytical responsibilities for pricing, marketing and sales. Particularly enjoys Anglo-American involvement.
Age 34 Salary £12,000
7. **Merchant Banker.** BA (Cantab) Law MBA (IMEDE) Good French with substantial legal and banking experience in Australia and Europe. Wishes to move into industry with long-term prospects in view.
Age 35 Salary c. £12,000
8. **International Banker,** whose excellent track record includes general management business development and high-level negotiations. He has particular experience of the Far East. Location entirely flexible.
Age 54 Salary basic c. £18,000
9. **Finance Director.** BA ACA. Fluent German and French. A most likeable and successful young 'highflyer' with major diversified international group experience involving manufacture, transport and financial service. Seeking a UK base for family reasons.
Age 33 Salary c. £15,000
10. **Financial Controller.** BSc 1st Class finance and economics. AAIA. The impressive controller of a large subsidiary of a major international group, having had to return to UK for family reasons now wishes to resume a role in financial line management. An excellent knowledge of the leisure, travel and luxury industries.
Age 41 Salary £14,000
11. **Finance Director.** FCA prize winner. A most impressive track-record in large-scale retail and wholesale operations, in addition to some manufacturing experience.
Age 43 Salary £15,000
12. **Finance Director.** BSC 1st Class Hons. His extensive international experience covers the Middle East and the Caribbean with governmental as well as industrial assignments in the mining, bauxite and metals industries. Location entirely flexible.
Age 48 Salary c. £20,000

MARKETING

13. **Export Sales Manager.** Fluent French, German and Spanish. An impressive highflyer with successful sales management experience covering Scandinavia, East Europe and the Caribbean in fast-moving consumer goods. Seeking greater responsibility.
Age 22 Salary £6,000+
14. **Export Manager.** HND. Fluent Arabic, some French and German. An enterprising selfstarter with consumer goods experience (mainly luggage and packaging, who has operated very profitably in Europe the Middle East and Scandinavia. Seeking career development.
Age 27 Salary £8,000
15. **Sales Manager.** BSc (Hons) Elect. Eng. A successful sales engineer with R&D experience in communications and guidance systems especially in the Middle East. Seeks greater remuneration, location flexible.
Age 28 Salary £8,000
16. **Export Marketing Manager.** MA Mkt BA econ. A natural linguist with working French, Spanish, Italian and Portuguese. Has both practical and academic experience in marketing, admin. and a wealth of published material. Location entirely flexible overseas.
Age 32 Salary circa £7,500
17. **Marketing Manager.** An electronics engineer with an impressive record in major technical groups especially in audio-visual, hi-fi and television industries. Ambitious and industrious and wishes to progress his career in high technology products – vidio discs, microprocessors etc.
Age 33 Salary £8,000+
18. **Export Manager.** MA Cantab (Hons) sciences. Good German and French. His successful career has been in the chemical and textile industries. Now seeking further career development and increased remuneration.
Age 33 Salary circa £10,000
19. **Marketing Manager.** BA (Econ) good French. Following his successful career to date with major fast-moving consumer goods groups, he wishes to move to smaller company with greater direct involvment.
Age 35 Salary £12,500
20. **Area Export Manager.** BA (Hons) fluent German and French. A true professional with plenty of drive and commonsense and a good knowledge of the Middle East, Audio-visual and publishing products. Promotion blockage.
Age 34 Salary £9,000+
21. **Head of Market Development.** Fluent French, good Italian with 12 years' experience in food manufacture and distribution in major European group he now seeks career development in line management. A good top
Age 39 Salary £20,000
22. **European Sales Manager.** BSc. C. Eng. MIEE. Fluent German. A design engineer with 13 years' international sales experience in low voltage products. Promotion blockage. Seeks greater responsibility which could include start up operations. **Age 41 Salary £9,000+**
23. **Marketing Manager.** BSc 1st Class Hons Dip. B. admin. An impressive high technology engineer who has developed into a highly successful electronics sales manager. Promotion blockage – seeks career development that could lead to general management.
Age 47 Salary £12,000+
24. **Export Marketing Manager.** Ecole Hotiere 1st Class Fluent French and German. His impressive career covers fashionware, catering equipment and food.
Age 41 Salary £10,000

GENERAL MANAGEMENT

25. **Resident Engineer.** BSc 1st Class civil eng. MICE. MIPHE. An impressive engineer with consultancy, design and site management experience in Middle East. Present contracts nearing completion. Location flexibile.
Age 31 Salary £12,000
26. **General Manager/Controller.** ACMA. A strong general manager with considerable financial management experience in the retail food industry. A good man manager who has successfully completed a 'greenfield' start up operation.
Age 33 Salary £12,000
27. **General Manager.** HND Mech E with a successful career through marketing to present position with private engineering company. Frustrated by family ownership, seeks greater responsibility.
Age 34 Salary c. £15,000
28. **General Manager.** ACA with wide experience in horticultural products, electronics and consultancy. Wishes to return to line management.
Age 36 Salary £9,000+
29. **General/Sales Manager.** BA Hons. Oxon. chemistry. Good French. A most impressive record with major industrial group, in the UK and overseas. A good man manager with strong sales and marketing experience.
Age 36 Salary £10,000+
30. **General Manager.** (Technical) HNC Mec. E. A thoroughly practical engineer with successful record in international mining quarrying and construction, seeking a new opportunity.
Age 36 Salary £10,000
31. **Hotel and Site Manager.** Fluent Spanish. Good French. 8 years' experience in hotel building and management in Spain with a good knowledge of tourism. Location very flexible.
Age 43 Salary £10,000
32. **General/Sales Manager.** An impressive senior executive whose wide range of experience covers automative products in Europe building services, the leisure industries and glass production. An excellent record for profit making. Seeking a career move with increased remuneration.
Age 35 Salary £12,500+
33. **Business Manager.** FCA. As joint M/D and F/D he has successfully turned round a substantial private company following 7 years with retail bookmakers. A likeable and practical man seeking greater responsibility with medium sized company.
Age 37 Salary £12,500
34. **Technical Director.** BSc Hons. Good Portuguese and French. A practical engineer with extensive experience of large volume production (food) in developing countries. Will locate wherever necessary.
Age 47 Salary £12,500 (UK)
35. **Chief Executive.** BSc. MIEE. C. Eng. A tough experienced M/D in electrical and radionics manufacture with excellent record for profitability. Present task completed, now seeking long term career move.
Age 54 Salary £20,000
36. **Group Chief Executive.** MA. (Cantab) Econ. Fluent French with wide international experience in manufacture, leisure industries and general trade and particular knowledge of the Far East at senior levels. Location very flexible.
Age 43 Salary circa £25,000

NOTES
(i) All the above executives have been interviewed by us and we consider them to be high quality material in their particular range – there are several others whom space precludes.

(ii) If you require an executive of similar capability please contact me.

(iii) If you yourself feel that you match these standards and might benefit from a new opportunity please contact me in the strictest confidence and without any obligation.

Robin R. Scholey

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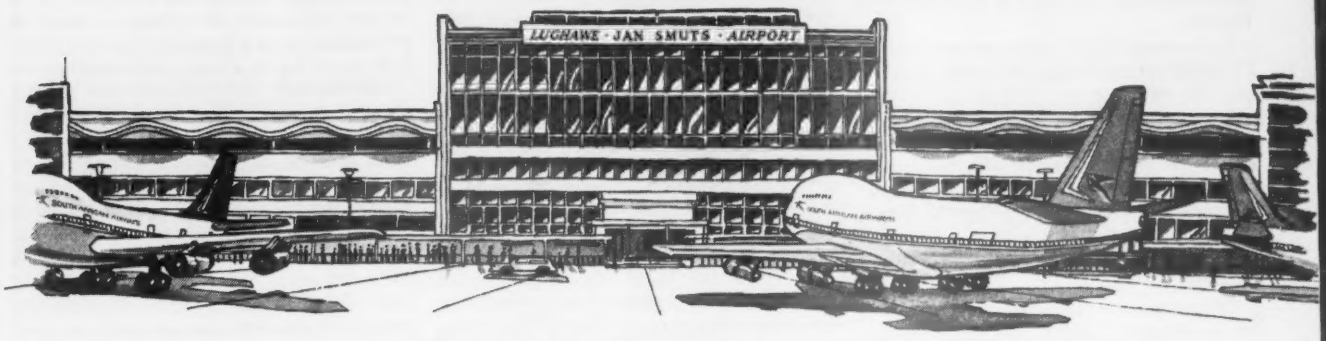

Our service doesn't just stop here.

Every evening, an SAA jumbo leaves Heathrow bound for Johannesburg.

But SAA doesn't just stop there.

Our comprehensive system serves 22 major destinations throughout Southern Africa. A unique network. And our big jet fleet ensures fast, convenient services to key centres linked with our international flights.

Our flights from London are extra fast too. The latest 747 Super B and 747SP aircraft. Our Flying Hotels.

And three of our flights are non-stop. On Mondays and Fridays non-stop to Johannesburg. On Saturdays non-stop to Cape Town plus a one-stop service to Johannesburg. Ideal for the business traveller.

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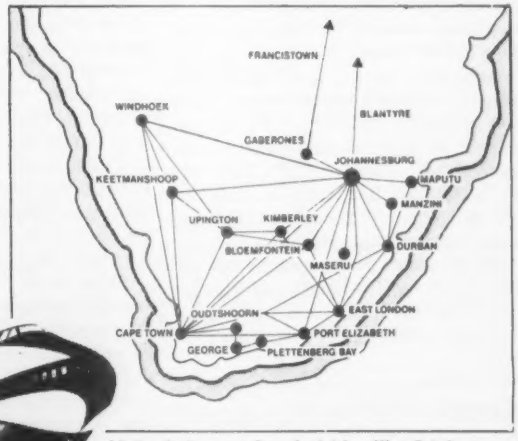

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Or at Waterloo Street, Birmingham, 021-643 9605. Hope Street, Glasgow, 041-221 2932. Peter Street, Manchester, 061-834 4436.

Home news

CAA deficit down by £28m

The Civil Aviation Authority has reduced its annual financial loss after interest charges from £44 million in 1976-77 to £15.6 million in 1977-78.

In its annual report and accounts for 1977-78, published on 20 September, the authority says that while the previous year represented a turning point in the authority's affairs, the latest results show that the CAA is now well round the corner. In 1977-78, its income increased by 38 per cent. Its operating expenditure increased less than 1 per cent in spite of inflation, underlining the efforts which had been made to use resources as effectively as possible.

On operations where charges are controlled by the authority (airport and north Atlantic air traffic services, safety, economic and miscellaneous services), a profit of £4.3 million was made, compared with £0.3 million in 1976-77.

On operations where the authority cannot fully recover its costs because of intergovernmental agreements, or for social reasons, a loss of £12.8 million was made, compared with £32.9 million in 1976-77.

The year under review, says the report ('Civil Aviation Authority annual report and accounts 1977-78,' from CAA, £2.50 plus 60p for postage), was one of rapid change and innovation. On routes to and from the United States, in particular, the competitive climate changed almost beyond recognition. Commenting on this, chairman, Nigel Foulkes, said that 'the CAA had had some reservations about the pace of recent changes, but the general movement towards a wider range of choice for the customer and the acceptance that air transport was primarily a mass leisure market was in line with economic policies which the authority had steadily tried to encourage over the years'.

Maclennan hails consumer influence in decision-making

Although the consumer movement in Britain might have lacked the galvanic flair of Ralph Nader in the United States, it was steadily extending its influence upon the social and economic decisions being made in this country, Robert Maclennan, Parliamentary Under-Secretary of State for Prices and Consumer Protection, told the National Consumer Congress in Edinburgh on 15 September.

Mr Maclennan said that the congress, organised by the National Consumer Council, was a first step towards consumer democracy. The consumer influence upon government and industry would increase as their spokesmen's representative role was developed.

The last decade had seen major legislative advances in consumer protection, he said, and there were more important legislative developments in the pipeline. Less well chronicled, however, were the steps that had been taken, particularly in the last few years, to enable the consumer to penetrate directly the decision-making process. This was a development of significance in which he believed Britain was taking the lead among the developed countries.

The advances may be thought relatively small but they were on a wide front and they were all moving in the same direction. In government, there had been the setting up of the Department of Prices and Consumer Protection with its secretary of state taking the voice of the consumer into the cabinet itself.

Many of the issues that came before government for decision had a consumer dimension which merited particular attention. Issues of trade, agriculture, industry, fiscal policy, for example, all had to be resolved by balancing different, not always easily reconciled, considerations. It was right, he added, that the interests of people as consumers should be brought into the discussion along with their interests as employees, taxpayers, or managers of production.

Mr Maclennan pointed out that in the European forum, Britain was the only country regularly to send a consumer minister as a member of the delegation to the council of agricultural ministers. In the National Economic Development Council, successive chairmen of the National Consumer Council had been appointed to serve as full members. In the nationalised industries, an experiment had been begun with the appointment of two members to the Post Office board specifically to protect the consumer interest.

These were among the more obvious examples of institutional penetration made by the consumer movement, he said. They were an important beginning and they marked a shift in the self-appraisal of the consumer movement from the role of lobbying gadfly to that of the responsible representation of a nationwide constituency. But if this development was to be durable and further advances were to be made, then the movement would have to be seen to be rooted not only in the concerns of the community but to be owing its right to be heard to the mandate of the community.

Competition policy to be reviewed

Firms operating efficiently in competitive markets have nothing to fear from the new prices policy, but it offers the consumer protection against exploitation where competition itself is not strong enough or vigorous enough to keep prices adequately in check. The new policy has been in operation for just over a year and the government believed that it had proved itself, said John Fraser, Minister of State for Prices and Consumer Protection, in Warrington on 20 September.

The minister, who was speaking at the north-west branch of the Institute of Purchasing and Supply, said that the new prices policy did not and would not attempt to keep all prices under control because it operated essentially as an aspect of competition policy.

Late last year, the government had set up a comprehensive review of competition policy. The outcome of the first part of the review's work, covering monopolies and mergers, had been published as a green paper in May. In announcing the next stage, prices secretary Roy Hattersley had invited interested bodies, including the institute to comment direct to the review group, which was in the process of examining the remaining areas of competition policy, so as to influence proposals at their formative stage.

Mr Fraser said the remaining areas to be examined included the general effectiveness of the restrictive trade practices legislation and whether it could be improved. While he could not prejudge the outcome of the review, he believed it would suggest changes which would considerably improve the operation of the legislation.

One area of particular concern for the restrictive trade practices legislation was the limitations on the powers of the Director General of Fair Trading, Gordon Borrie, to investigate unregistered restrictive trading agreements between firms.

He explained that at present the director general could only serve notice on a company asking whether it was party to an unregistered agreement if he had reasonable grounds for believing a company to be party to a restrictive agreement. But the courts had ruled, however, that it was for them to decide whether there were reasonable grounds, and that it was not enough for the director general to have strong suspicions about the existence of an unregistered agreement.

Given these limitations, it was the government's intention, when opportunity permitted to take action to strengthen the director gen-general's powers of investigation to enable him to carry out these responsibilities to the fullest extent.

Marley Tile price proposals to be investigated

Price increases proposed by Marley Tile are to be investigated by the Price Commission. The company wants to increase by an overall weighted average of 4.5 per cent the prices of its concrete roof tiles and fittings.

After considering the proposed increases the

continued on p. 704

Health and Safety Executive Publications

The 1974 Health and Safety at Work Act gave the Health and Safety Commission responsibility for keeping some 25 million people informed of guidelines and regulations for their health and safety in places of work. The Commission has undertaken progressively to revise, standardise and extend the existing regulations and recommended practices. HSC/HSE publications reflect the major programme of research, inspection and consultation which is in hand.

Priced publications are obtainable only from HMSO or through booksellers. Some general leaflets, advice and information are available free of charge from HSE Area Officers or by post from the General Enquiry Point, Baynards House, 1 Chepstow Place, London W2 4TF (Tel. 01-229 3456 ext. 734).

Annual Reports

Health and Safety: Commission Report 1976–77 (£1.25) ISBN 011 883073 2
Health and Safety: Industry and Services 1976 (£2.50) ISBN 011 883022 8
Health and Safety: Mines and Quarries 1977 (£2.25) ISBN 011 883201 8
Health and Safety: Research 1976 (£1.75) ISBN 011 883012 0
Health and Safety: Statistics 1975 (£1.75) ISBN 011 883008 2
Industrial Air Pollution 1976 (£3) ISBN 011 883074 0
Mines and Quarries District Reports 1976 (£1.50 each)
Health and Safety: Agriculture 1976 (£1.00) ISBN 011 883021 X
Health and Safety: Nuclear Establishments 1975–76 (£1.15) ISBN 011 883018 X
Health and Safety Employment Medical Advisory Service Report 1975–76 (£1.50) ISBN 011 883017 1

Advisory Committee Reports and reports of special investigations etc.

The Flixborough Disaster (£2.50) ISBN 011 361075 0
The explosion at Laporte Industries Ltd April 1975 (£1.25) ISBN 011 880333 6
The explosion at Houghton Main Colliery June 1975 (£1) ISBN 011 880328 X
The explosion at Appleby-Frodingham steelworks, Scunthorpe. November 1975 (£4) ISBN 011 88033 4
The explosion at the Dow Chemical Factory, Kings Lynn. June 1976 (£1) ISBN 011 883003 1
A survey of respiratory disease in the Pottery Industry (35p) ISBN 011 880346 8
Success and failure in accident prevention (80p) ISBN 011 880330 1
Final Report of the Advisory Committee on Falsework (£2) ISBN 011 880347 6
First Report of the National Committee on steep seam working in British coal mines (60p) ISBN 011 410248 1
Advisory committee on Major Hazards: First Report (£1) ISBN 011 880884 2
Selected written evidence submitted to the Advisory Committee on Asbestos 1976/77 (£5) ISBN 011 883004 X
Asbestos Health Hazards and Precautions, Interim statement (10p) ISBN 011 881114 2
Safe Manriding in Mines Parts 1A and 1B (£5) ISBN 011 880491 X
Digest of Pneumoconiosis 1975 (£2) ISBN 011 882006 0
Some aspects of the safety of nuclear installations in Great Britain (Replies to questions submitted by the Secretary of State for Energy to the Nuclear Installations Inspectorate in October 1976) (£1) ISBN 011 8830015
One hundred fatal accidents in construction (90p) ISBN 011 883071 6
The Fire on HMS Glasgow. 23 September 1976 (£2.75) ISBN 011 883075 9
Asbestos: Measurement and Monitoring of Asbestos in Air (£1) ISBN 011 883084 8
Asbestos: Work on Thermal and Acoustic Insulation and Sprayed Coatings (50p) ISBN 011 883083 X
Canvey Island an investigation of potential hazards from operations in the Canvey Island/Thurrock area (£10) ISBN 011 883200 X (Summary of Report (£1) ISBN 011 883203 4)

Health and Safety at Work Series booklets

3 Safety Devices for Hand and Foot Operated Presses (0 11 880862 1) (30p)
4 Safety in the use of Abrasive Wheels (0 11 880866 4) (65p)
5 Cloakroom Accommodation and Washing Facilities (0 11 880850 8) 45p)
6A Safety in Construction Work: General Site Safety Practice *(Reprinting)* (0 11 360120 4)
6B Safety in Construction Work: Roofing 1974 (0 11 880870 2) (16p)
6C Safety in Construction Work: Excavations (0 11 360101 8) *(Reprinting)*
6D Safety in Construction Work: Scaffolding (11 881452 4) (30p)
6E Safety in Construction Work: Demolition (11 360848 9) (25p)
11 Guarding of Hand-fed Platen Machines (0 11 880873 7) (18p)
12 Safety at Drop-Forging Hammers (0 11 880855 9) (18p)
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17 Improving the Foundry Environment 1974 (0 11 360849 7) (32p)
18 Industrial Dermatitis: Precautionary Measures (0 11 880877 X
20 Drilling Machines: Guarding of Spindles and Attachments 1974 (0 11 880865 6) (35p)
22 Dust Explosions in Factories (0 11 880851 6) (30p)
23 Hours of Employment of Women and Young Persons (0 11 880876 1) (25p)
24 Electrical Limit Switches and their Applications (0 11 880840 1) (25p)
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27 Precautions in the use of Nitrate Salt Baths (0 11 880880 X) (25p)
29 Carbon Monoxide Poisoning Causes and Prevention (11 360838 1) *(Reprinting)*
30 Storage of Liquified Petroleum Gas at Factories (0 11 880882 6) (45p)
31 Safety in Electrical Testing (0 11 880843 5) (38p)
32 Repair of Drums and Small Tanks (0 11 880852 4) (25p)
33 Safety in the use of Guillotines and Shears (0 11 880861 3) (30p)
34 Guide to the use of Flame Arresters and Explosion Reliefs *(Reprinting)*
35 Basic Rules for Safety and Health at Work (0 11 880857 5) (20p)
36 First Aid in Factories (0 11 880842 7) (25p)
40 Means of Escape in case of Fire in Offices, Shops and Railway Premises (0 11 880860) (20p)
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42 Guarding of Cutters of Horizontal Milling Machines (0 11 880871 0) (30p)
44 Asbestos: Health Precautions in Industry 1974 (0 11 880879 6) (25p)
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46 Evaporating and Other Ovens (0 11 880872 9) (55p)
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48 First Aid in Offices, Shops and Railway Premises (0 11 883132 1) (25p)
49A Safety in the Cotton and Allied Fibres Industry. Opening Processes (0 11 360851 9) (25p)
49B Safety in the Cotton and Allied Fibres Industry. Card-room Processes (0 11 360854 3) (40p)
49C Safety in the Cotton and Allied Fibres Industry. Spinning, winding and sizing (0 11 360858 6) (45p)
49D Safety in the Cotton and Allied Fibres Industry, Fabric Production (011 883078 3) (60p)
50 Welding and Flame Cutting using Compressed Gases (011 883080 5) (25p)

*** Health and Safety Commission leaflets**

HSC 2 The Act outlined
HSC 3 Advice to employers
HSC 4 Advice to the self-employed
HSC 5 Advice to employees
HSC 6 Employers Policy Statements
HSC 7 Regulations, codes of practice guidance literature
HSC 8 Safety Commissions guidance to employers whose employees are not members of recognised independent trade unions

*** Health and Safety Executive leaflets**

HSE 1 After Flixborough . . . 10 vital questions for industry
HSE 4 Short guide to the Employers' Liability (Company Insurance) Act 1969
HSE 5 An introduction to the Employment Medical Advisory Service

*** Agricultural Safety leaflets**

AS1 A short guide to the 1974 Act
AS2 Tractors safety cabs
AS3 Bulls
AS4 Mushroom worker's lung
AS5 Farmer's lung
AS6 Crop spraying
AS7 Guns
AS8 Noise
AS10 Children
AS14 Cyanide gassing powders – Safe handling
AS16 Brakes for tractor-trailer safety
AS21 First aid in agriculture

*** EMAS leaflets**

MS(A)1 Lead and you
MS(A)3 Asbestos and you
MS(A)4 Study of asbestos workers
MS(A)5 The health of workers engaged in antimony oxide
MS(A)6 Vinyl chloride and you
MS(B)1 Ulceration of the skin and inside the nose caused by chrome
MS(B)3 Anthrax
MS(B)4 Effects on the skin of pitch and tar
MS(B)5 Skin cancer caused by oil
MS(B)6 Occupational industrial dermatitis
MS(B)7 Poisoning by pesticides

Guidance Notes

Guidance Notes (price 30p each) are too numerous to list here but are published under five headings:
Medical
Environmental Hygiene
Chemical Safety
Plant and Machinery
General.

Enquiries to HMSO

* *Free of charge*

commission decided that they should be the subject of an investigation under section 4 of the Price Commission Act 1977.

The commission has notified the Secretary of State for Prices and Consumer Protection that it intends to investigate the increases. The investigation is due to be completed by 28 December 1978.

Merger proposals cleared

Secretary of State for Prices and Consumer Protection Roy Hattersley has decided, on the information at present before him, not to refer the following merger situations to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973:

Saint Piran Ltd and a substantial minority shareholding in Orme Developments Ltd.

Comben Group Ltd and Orme Developments Ltd

Manchester Garages Ltd and Oliver Rix Ltd.

The reference to the proposed merger between Preussag AG and Amalgamated Metal Corporation Ltd on page 644 in last week's *Trade and Industry* should have made it clear that Secretary of State Roy Hattersley had decided, on information at present before him, against reference of the proposed merger to the Monopolies and Mergers Commission.

Proceedings against mortgage broker

Director General of Fair Trading Gordon Borrie has started proceedings in Edmonton County Court for alleged refusal to give satisfactory assurances under the Fair Trading Act against John James O'Brien of Bush Hill Park, Enfield, Middlesex, formerly a director of Acrohurst Ltd, mortgage brokers of Enfield.

Bank charges report

Secretary of State for Prices and Consumer Protection Roy Hattersley announced on 21 September that he has concluded his consideration of the Price Commission report 'Banks: charges for money transmission services published on 18 April.'

Letters to the editor

Letters to the editor should be addressed to the Editor, *Trade and Industry*, Room 437, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

More time to examine distribution of jeans

More time has been given to the Price Commission for the completion of its examination into the distribution of jeans and similar trousers. Particulars of the variation, which was made on 22 September, are as follows:

Whereas the Secretary of State for Prices and Consumer Protection on 20 June 1978 pursuant to section 10(1) of the Price Commission Act 1977 gave a direction to the Price Commission requiring them to examine and, before 1 October 1978, to make a report to him on certain questions relating to the distribution of denim jeans and similar trousers made of cotton drill, canvas and corduroy:

Now the secretary of state, pursuant to section 10(3) of that act and after consulting the Price Commission and the Director General of Fair Trading, hereby varies the said direction so as to require the Price Commission to make the said report before 11 November 1978 instead of before 1 October 1978.

Freeze on tv rental charges

The tv rental charges of Thorn Television Rentals Ltd and of Visionhire Ltd should not be increased before 1 April 1979. This is the principal conclusion in the Price Commission's report on tv rentals released on 20 September.

The commission was required by the Secretary of State for Prices and Consumer Protection to examine the charges, costs and margins in the hiring of television sets for domestic use, in particular by Thorn Television Rentals Ltd, Rumbelows Ltd, Granada TV Rental Ltd, Rediffusion Ltd, Visionhire Ltd and Relay Vision Ltd.

The commission found that the named companies held 58 per cent of the television rental market in 1978 as compared with 45 per cent in 1971. Part of the increased share had resulted from the acquisition of smaller companies. The Thorn group, including Rumbelows, has 29 per cent of the total market, Granada about 12 per cent and Visionhire plus Relay Vision, like Redifusion, over 8 per cent.

The commission says that when considering any proposed increase in charges notified in the future by any of the television rental companies, it intends to pay particular attention to a number of issues. These are that the trend in price of television sets together with improvements in their reliability and any consequent reduction in servicing costs; the need to promote competition, including the avoidance of undue price parallelism; evidence of constructive joint planning between the manufacturing and rental sectors of the industry, with particular concern as to the effects on the UK balance of payments; the stimulation by the rental companies of new product development and the associated financial requirements and degrees of risk involved.

Roy Hattersley, Secretary of State for Prices and Consumer Protection, is considering the report, and will be consulting interested parties about its findings. Those who consider that they might be affected by the report may make representations in writing to the secretary of state within 28 days of the report's publication.

German mission tours Nuclear Enterprises

Project manager Brian Fraser demonstrates a new ultrasonic medical diagnostic probe to a party of German industrialists touring the Edinburgh laboratories of Nuclear Enterprises. The party was one of several groups of German businessmen making fact-finding tours of industrial areas in the UK. It was arranged by the Department of Industry's Invest in Britain Bureau together with RKW, a large German trade association and the German Chamber of Industry and Commerce.

Regulations for safer prams and pushchairs

New regulations on effecting the safety of prams and pushchairs were published on 22 September. Announcing the publication, Minister of State for Prices and Consumer Protection John Fraser said that he saw the regulations as an important first step towards the imposition of more comprehensive safety requirements.

The regulations, which are made under the Consumer Protection Act 1961 and based on the relevant British Standards, include requirements relating to stability, efficient braking devices, the provision of harness anchorage points and adequate locking devices on folding prams and pushchairs.

The regulations come into operation on 1 January next year for manufacturers and importers and on 1 July for wholesalers and retailers. They will be enforced by local trading standards authorities. (Printed copies of the regulations have been delayed as a result of an industrial dispute at HMSO.)

Further areas of safety have been suggested to Mr Fraser in the course of consultations with interested parties. These suggestions, which are not at present covered by the British Standards, might be included in future regulations. Among them are: stability tests and braking tests to allow for the presence of a reasonable weight of shopping; stability tests to take account of the movement of the child; tests, particularly those on wheel security, to take account of the fact that occupied prams and pushchairs will be pushed up and down stairs and bumped on kerbs and stairs; and toxicity of paint.

Protection for credit card holders

Director General of Fair Trading Gordon Borrie is considering what further action should be taken towards achieving equal status for all credit card holders covered by section 75 of the Consumer Credit Act. Commenting on announcements from Access and Barclaycard that they are now offering more explicit assurances of protection against faulty goods or services purchased through credit cards, the director-general said that this was a step in the right direction for the majority of credit card holders but he was not happy about the continuing uncertainty for card-holders about their legal rights.

Mr Borrie has held talks with senior officials of Access and Barclaycard to express his concern about the way in which the two companies appeared to be interpreting section 75 of the Consumer Credit Act. This section, which came into effect on 1 July 1977, gives the purchaser the right to claim against the lender as well as the retailer or supplier for faulty goods or poor services bought on credit where the retailer or supplier has a direct agreement with the company providing the credit facility.

The position of Barclaycard and Access card holders is that for cards first taken out on or after 1 July 1977: the card holder has, under section 75, the right to claim against both the retailer (or supplier) *and* the credit card company for misrepresentation or breach of contract if he uses his credit card to purchase goods or services which prove to be defective or below standard. This protection includes the right to claim 'consequential damages' – ie, compensation for injuries or damage arising out of the defective goods or services.

For cards first taken out before 1 July 1977 there are differing legal views on whether the full protection of section 75 applies to these card holders. Access and Barclaycard take the view that the protection provided under this section does not extend to card holders whose present cards have been issued under an agreement which first started before 1 July 1977. Both companies told the director general that they are willing to accept liability for defective products or services, the liability being limited to the amount of the transaction debited to the card holder's account.

Commenting on the companies' announcements, Mr Borrie said that in his talks with Access and Barclaycard, he expressed the view that parliament had not intended that there should be two classes of credit card holders especially since – according to the companies' views of the law – the many card holders who first entered into their credit card agreements before 1 July 1977 would not have the same protection as 'new' card holders. The fact that the law was capable of different interpretations was unsatisfactory for all concerned, he said.

Safety regulations for cosmetics next month

Some 350 substances which cosmetics must not contain are covered in new regulations published on 20 September. Others are listed which may only be used within certain limits and subject to prescribed labelling requirements concerning safe usage.

The Cosmetic Products Regulations 1978, include a wide-ranging general requirement that cosmetics should not be harmful to health in normal use. They restrict the range of colours which may be used in products which come into contact with the mucous membranes and require cosmetic products generally to bear such information as the name and address of the manufacturer and batch number.

The regulations are made under the Consumer Protection Act 1961 and the European Communities Act 1972, and signed by the Minister of State for Prices and Consumer Protection, John Fraser. They implement EEC directive 76/768 of 27 July 1976.

The regulations on general safety requirements (applicable only to manufacturers and importers) take effect on 15 October. Compositional requirements come into force for manufacturers and importers on 1 January 1979 and for wholesalers and retailers on 29 July 1979. Labelling requirements take effect on 29 July 1979 but wholesalers and retailers have a further two years in respect of products supplied by manufactuers and importers before this date.

Up to the present time, there have been no restrictions on the composition of cosmetic products and no requirements as to safety labelling, except in those few cases where they contain a listed poison. Comparatively few complaints are received about allegedly unsafe cosmetics and toilet preparations and this undoubtedly reflects the care already exercised by responsible manufacturers in ensuring that their products are safe in normal use.

Very occasionally, a cosmetic may give rise to concern, as in the case of certain surmas or eye cosmetics used by some members of the Asian community which consist substantially of lead sulphide. These will be prohibited by the regulations.

The purpose of the EEC directive is to harmonise the laws relating to the safety of cosmetic products throughout the community. The regulations apply to all cosmetic products on sale in Great Britain, whether made in this country or imported and will be enforced by local weights and measures authorities.

The printed version of the regulations has been postponed as a result of an industrial dispute at HMSO.

Products covered by the new regulations

Creams, emulsions, lotions, gels and oils for the skin (hands, face, feet, etc)
Face masks
Tinted bases (liquids, pastes, powders)
Make-up powders, after-bath powders, hygienic powders, etc
Toilet soaps, deodorant soaps, etc
Perfumes, toilet waters and eau de Cologne
Bath and shower preparations (salts, foams, oils, gels, etc)
Depilatories
Deodorants and anti-perspirants
Hair care products:
- Hair tints and bleaches;
- Products for waving, straightening and fixing;
- Setting products;
- Cleansing products (lotions, powders, shampoos);
- Conditioning products (lotions, creams, oils);
- Hairdressing products (lotions, lacquers, brilliantines)

Shaving products (creams, foams, lotions, etc)
Products for making-up and removing make-up from the face and the eyes
Products intended for application to the lips
Products for care of the teeth and the mouth
Products for nail care and make-up
Products for external intimate hygiene
Sunbathing products
Products for tanning without sun
Skin-whitening products
Anti-wrinkle products

New VAT return form explained

VAT News 14, together with a supplement to notice 700 'VAT general guide' and a new VAT leaflet (Relief from VAT on bad debts) is now being distributed to all VAT registered traders. Those traders who have declared exempt outputs on their tax returns will also receive a revised notice 706 'VAT: partial exemption and self-supply of stationery'.

Articles of general interest in *VAT News* include information on the new VAT return form; the issue on request of blank copy return forms; the staggering of tax periods; the use of cashbook accounting; the withdrawal of group return form 101; the revised registration and de-registration turnover limits; the new legal provisions on supplies of goods on credit and a reference to pre-1978 supplies of credit. Other items include reminders concerning the need to account for VAT on imported goods; the need to notify the cessation of taxable supplies on certain changes in business; and when deductible input tax may be claimed.

In addition, there are points concerning the scope and coverage of VAT in respect of international services; delivery of meals; packaging, when supplied with zero-rated contents; salvage and towage services; vocational train-

ing; and animal feedingstuffs. *VAT News* 14 also contains an extant list of VAT leaflets, including several issued since last November; brief explanations of relevant orders and regulations, and amendments to notices 701 'VAT: scope and coverage' and 709 'VAT: hotels, catering and holiday services'.

Supplement to notice 700 'VAT: general guide', has been prepared for use alongside the general guide, last revised in September 1975. The provision of a complete contents list in the supplement makes cross-referencing possible.

VAT leaflet 8/78/VAC explains the operation of the bad debt relief scheme announced in the budget speech by the Chancellor of the Exchequer. The scheme introduces relief for the VAT element of bad debts, where debtors are declared formally insolvent after 1 October this year.

Revised notice 706 'VAT: partial exemption of self-supply of stationery', takes account of the extended rules whereby a partly exempt person can be treated as fully taxable and of the changes in annual adjustment procedures which became operative earlier this year and which were outlined in notice 733, April 1978.

'It's about here the fish and chips begin to mingle with the garlic sausage.'

Government ready to look at revised 'Chunnel' proposals

Commenting on a revised scheme for a single-bore Channel tunnel which is being investigated jointly by British Rail and its French counterpart, SNCF, Secretary of State for Transport William Rodgers said that he understood that the British and French governments would before long be receiving the railways' recommendations. Urgent and careful consideration would be given to any such recommendations.

Mr Rodgers, who was speaking at the European passenger-train timetable and tariff conference in Edinburgh on 20 September, pointed out that the British government was also keen to encourage profitable investment in railway shipping, hovercraft and port facilities to cater for the growing demand for services across the Channel and North Sea. A great deal had already been done to facilitate such investment and, since the government regarded the future for rail travel between Britain and the mainland of Europe as encouraging, it would continue to facilitate such investment.

Counselling service helps 500th customer

The small firms counselling service which was launched in the north less than a year ago has just helped its 500th customer – Modexynon Electronics.

Using retired or semi-retired businessmen, the service tries to solve specific problems brought to it by small businesses in Northumberland, Tyne and Wear, Durham, Cleveland and Cumbria.

Matt Chisholm, manager of the small firms information centre for the north, based in Newcastle upon Tyne, said that he was delighted that the scheme which was pioneered informally there in 1975 had got off to such a successful start in its first year. 'Many more firms could be helped with specific queries,' he said, 'whether it be about getting finance, solving technical or production problems or just the mechanics of getting a firm going.'

Modexynon Electronics' founder, Andrew Piaskowski, said that the small firms counselling service was a great help in getting his business going and was still proving to be so. 'It provided us with sources of information and with expertise which we would have found difficult to get anywhere else,' he said. 'And even when we were despairing over some of the obstacles, the counsellors never gave up. I would recommend any small firm with problems to go to them and seek their expert advice.'

Code on time off for safety representatives

An approved code of practice, giving guidance on 'Time off for training of safety representatives' was published on 20 September by the Health and Safety Commission and will come into effect on 1 October, at the same time as the safety representatives and safety committees regulations.

The code should be read in conjunction with the HSC booklet 'Safety representatives and safety committees' (HMSO, 35p), which includes the full text of the regulations, together with the approved code of practice on the regulations and notes of guidance. The regulations provide for safety representatives to be given time off for training in their function 'as necessary'.

Copies of the approved code of practice can be obtained free of charge from HSE area offices or from the HSE inquiry point, Baynards House, 1 Chepstow Place, London W2 4TF.

British Gas takes over factory in Cramlington

British Gas Corporation has purchased a 5000 m² factory on the Nelson industrial estate at Cramlington from the English Industrial Estates Corporation which administers the estate for the Department of Industry.

British Gas will spend some £2.5 million to equip the premises for the development, design, manufacture and operation of an inspection system for high-pressure gas pipelines.

This work, which is expanding, has been undertaken in a part of the British Gas engineering research station at Killingworth. In 1977 there were fewer than 60 people directly employed on it but this will rise to some 200 when the Cramlington premises are fully operational.

British Gas says that the move to Cramlington will be phased in from October this year and will be completed by August 1979. There is space available at the Cramlington factory for future expansion if this proves necessary.

. . . and Woodcraft expands at Hellaby

Voytone Ltd, trading as Woodcraft, has occupied additional advance factory premises of 225 m² immediately adjacent to its existing premises at Hellaby, near Rotherham. The premises, built by the English Industrial Estates Corporation, will be used to increase production of occasional furniture. Twelve new jobs have been created and a further eight vacancies are expected to arise during the next two years.

Encouraging improvement in wool textile industry – Cryer

Some £270 million has been made available to the 14 sectoral schemes designed to meet the specific needs of key sectors of industry and not, as was implied in *Trade and Industry*, 15 September, page 601, to the wool textile industry scheme alone.

Cosira opens office at Wellington

The Council for Small Industries in Rural Areas (Cosira) has opened new offices at The Lawns, Park Street, Wellington, Salop. Cosira was previously at Market Drayton where the two organisers, Cyril Stannett and Joan Bell, covered Cheshire, Salop and Staffordshire.

The new offices at Wellington not only provide more accommodation, but also a closer co-ordination of Cosira's activities within the

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Cycle champion rides to success – on computer program

All-round cycling champion Phil Griffiths has broken the British house record with the aid of an ICL 1501 computer terminal set up at the side of the track.

Paul Griffiths had just returned from the commonwealth games, where he was a member of the English team, when he decided to make an attempt on the 13-year-old distance record of 43.83 km in one hour. To process lap times, Baric Computing Services arranged for a special program to be written.

During the record attempt, the time for each of the 111.6 laps completed was recorded and keyed into the terminal so that the subsequent lap times necessary to break the record could be read off a visual display screen. Print-outs were also produced for distribution to the spectators.

Not only did Phil Griffiths break the hour record with a distance of 44.348 km, but he also broke three other records for the fastest times over five, 10 and 20 km.

three counties. Cosira's building section, previously at Newtown, Powys, has also moved to Wellington, giving Cosira's current factory programme added impetus.

What is Financial Statistics?

Financial Statistics is a monthly publication by the Central Statistical Office and the source of many figures used in articles by financial journalists and in stockbrokers' circulars. It brings together the key financial and monetary statistics of the United Kingdom.

Financial Statistics is the prime source of UK detailed quarterly *financial accounts*. These include all recorded financial flows between sectors of the economy and bring a sense of proportion to the statistics of the different types of financial institutions and the various savings media.

Financial Statistics contains *up-to-date information* on government accounts, public sector borrowing requirement, money stock, domestic credit expansion, company liquidity, interest rates and security prices.

An **Explanatory Handbook for Financial Statistics** is also available. It contains notes and definitions which add to the understanding of all the tables, and explains the relationship between them. The handbook is included in the annual subscription charge or can be obtained separately (£1.35 net).

Price £3.20 (by post £3.52). Annual subscription £43.91 including postage. From HMSO, PO Box 569, London SE1 9NH.

Official appointments

Monopolies and Mergers Commission: Roy Hattersley, Secretary of State for Prices and Consumer Protection, has appointed Mr E. S. Simpson, Mr E. A. B. Hammond and Mr H. L. G. Gibson as new part-time members of the Monopolies and Mergers Commission from 1 September 1978 to 30 June 1981. Mr Hattersley has also reappointed, for a further three-year period to 30 June 1981, the following members of the commission whose term of appointment expired on 30 June 1978: Sir Max Brown, Mrs C. M. Miles, Mr R. J. Aspray, Mr T. P. Lyons and Mr J. S. Copp.

Transport Users' Consultative Committee: Roy Hattersley, Secretary of State for Prices and Consumer Protection, has appointed Mrs C. C. Parry as a member of the Transport Users' Consulative Committee for Wales until 28 February 1981.

Patents recorded 'licences of right'

Under section 46 of the Patents Act 1977 the register was noted 'licences of right' in respect of the following patents on the date specified:

8 September 1978

1106637 Brown Boveri and Co Ltd
Controllable semi-conductor device
1156828 Brown Boveri and Co Ltd
Improvements in or relating to electical converter circuits
1161248 Brown Boveri and Co Ltd
Rectifier device
1183721 Brown Boveri and Co Ltd
Control of a current converter
1172940 Brown Boveri and Co Ltd
Improvements in and relating to a semi-conductor arrangement
1214238 Brown Boveri and Co Ltd
A process for manufacturing a semi-conductor device
1276203 Brown Boveri and Co Ltd
Method of doping a silicon member
1314982 Brown Boveri and Co Ltd
Improvements relating to rectifier circuits
1315010 Brown Boveri and Co Ltd
Improvements relating to static rectifier assemblies
1370593 BBC Brown Boveri and Co Ltd
A plasma spray torch and a method of operating the plasma spray torch
1495406 BBC Brown Boveri and Co Ltd
Apparatus to generate closing instructions for turbine valves in the event of power system short circuits
1500292 BBC Brown Boveri and Co Ltd
High-voltage d.c. transmission system
1460645 BBC Brown Boveri and Co Ltd
Method and apparatus for producing a semi-conductor component
1501050 BBC Brown Boveri and Co Ltd
Cooled turbine blade or vane
1126802 Chrysler United Kingdom Ltd
Improvements in motor vehicles
1152729 Chrysler United Kingdom Ltd
Cable anchor
1204855 Chrysler United Kingdom Ltd
Improvements in or relating to clutching mechanisms
1208102 Chrysler United Kingdom Ltd
Improvements in vehicle braking systems
1209924 Chrysler United Kingdom Ltd
Improvements in or relating to vehicle doors
1215246 Chrysler United Kingdom Ltd
Improvements in control levers
1224014 Chrysler United Kingdom Ltd
Improvements in closure caps
1242854 Chrysler United Kingdom Ltd
Improvements in or relating to motor vehicles with sunvisors
1252760 Chrysler United Kingdom Ltd
Improvements in or relating to an assembly comprising a shaft located in a hole in a member and a pin for securing the shaft to the member
1316161 Chrysler United Kingdom Ltd
Improvements in or relating to fuel tanks
1373637 Chrysler United Kingdom Ltd
Improvements in or relating to tyre pressure warning systems
1451095 Chrysler United Kingdom Ltd
Improvements in or relating to gear-boxes
1460027 Chrysler United Kingdom Ltd
Improvements in or relating to motor vehicles
1400355 United States Department of Energy
Corrosion resistant concrete
1449080 United States Department of Energy
Electrolyte for applying barrier anodic coatings
1449195 United States Department of Energy
Method and apparatus for producing rock bolts in the roof of a subterranean cavity
1457650 United States Department of Energy
Method of concentrating macromolecules
1466806 United States Department of Energy
Cathode for a secondary electrochemical cell
1151066 Societe Bertin and Cie
Surface effect machines
1151067 Societe Bertin and Cie
Surface effect machines
1400425 Albert Rolland SA
Substituted 3-hydroxymethyl isoquinolines and derivatives
1401975 Albert Rolland SA
3-Trifluoromethyl-analides
1508995 The Post Office
Improvements relating to digital data transmission systems
1509291 The Post Office
Improvements in or relating to cable stoppers
1205646 Emil Lange
Device with arc-extinguishing means
1225190 Standard Telephones and Cables Ltd
Radio navigation system
1231139 International Standard Electric Corporation
Dual amplifier circuit
1280656 Wandel and Goltermann GmbH and Co
Reactance circuit
1331784 Agfa-Gevaert Aktiengesellschaft
Cine camera with a dissolve device
1378582 EMI Ltd
Improvements relating to pressure transducers
1393607 Patrick Posso
A reel for flexible strip material
1443030 Coal Industry (Patents) Ltd
Sealing a tube in a bore
1485176 ITT Industries Inc
Automatic test arrangement for electronic components
1493138 Patelhold Patentverwertungs-Und Elektro – Holdings AG
Fibre network for the optoelectronic transmission of data between subscriber stations

Any person who claims that the proprietor of the patent is, and was at the time of the entry, precluded by a contract in which the claimant is interested from granting licences under the patent may, within three months after the making of the relevant entry, apply to the Comptroller on patents form 31/77 for cancellation of the entry.

I. J. G. Davies, Comptroller

Post Office orders new teleprinters

A batch of new ITT 2300 teleprinters for the Post Office are examined by John Freer, recently appointed managing director of ITT Creed. Some 12 000 teleprinters and associated equipment have been ordered from the company in contracts with the Post Office worth around £24 million. Approximately half the orders for teleprinters are for this new model and delivery will be completed by the end of 1979. The new teleprinter is suitable for use on all telex systems throughout the world, and its electronic design offers increased reliability and reduced maintenance. Complete in one desk-top unit, the 2300 offers a wide range of facilities and is claimed to be so easy to use that a typist can operate it without special training.

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Government sales

10 and 11 October – Vehicles

Location
Ordnance Storage and Disposal Depot, Ruddington, Notts

Auctioneers
Walker Walton and Hanson (Dept L), Byard Lane, Bridlesmith Gate, Nottingham (0602 54272)

Saloon cars including Morris 1000, Travellers, 1800s, Minis, Ford Escort estates and a variety of other cars. Bedford and Morris minibuses. Land-Rovers. Bedford trucks. Road and factory trailers. Coaches, cranes, fork-lift trucks and many other items.

Catalogue price 40p, postage 15p.

12 October 1978 – Furniture

Location
Cavalry Barracks, Redford, Edinburgh

Auctioneers
Dixon and Wallace (Dept L), Bank Buildings, Graham Square, Glasgow G31 1AW (041-554 2447)

The sale consists of mainly small or single item lots of furniture.

Catalogue price 20, postage 10p.

Catalogues, which give details of the lots, conditions of sale, viewing times, etc, are available from the auctioneers from two weeks before and up to the day of the sale.

WEMBLEY AUCTION SALES 1978

3 October 1978

View Days:	Day preceding and morning of sale
Location:	Department of the Environment Property Services Agency Supplies Stores India Pavilion Exhibition Grounds Wembley, Middx. Tel. 01-903 2508
Description of Goods:	Miscellaneous office equipment and furniture etc. (Potential buyers are advised to refer to the official catalogue available from the auctioneers, price 20p.)
Auctioneers:	Messrs Hollingsworth Westcombe House 56/58 Whitcomb Street Leicester Square London WC2H 7DR Tel. 01-839 1875

New publications

Reading between the clauses

New and extensive limits on the use of exclusion clauses – the 'small print' – in contracts and conditions of sale have now been introduced by the Unfair Contract Terms Act. Richard Lawson's book 'Exclusion clauses after the Unfair Contract Terms Act', provides the first, in-depth explanation of what clauses are now unlawful, unfair, void or ineffective. It also discusses ways in which an exclusion clause can become a contractual term, whether or not it will cover loss or damage, and how it is likely to be interpreted by the courts.

The book is divided into three main parts. The first concerns judicial control over this area of law and covers incorporation, interpretation, avoidance and qualification of exclusion clauses and the treatment of harsh and unconscionable bargains. Two following chapters are concerned with legislative control over unlawful, void and ineffective exclusion clauses and the final part is a practical guide to judicial and legislative control. This isolates some of the more likely problem areas and indicates the appropriate head of law. The new act is reproduced in an appendix together with the Consumer Transactions (Restrictions on Statements) Order 1976 and the Council of Europe Resolution (76) 47 on unfair terms in consumer contracts.

While this book is intended for practising lawyers, also covering the same topic is Alex Roney's booklet, 'Introducing the Unfair Contract Terms Act'. Aimed primarily at the non-lawyer, this is the first in the 'What every businessman should know' series. It sets out to provide useful information about current legislation affecting the commercial world and not to give a definitive statement of the law or replace the need to consult a solicitor.

The work is divided into five parts, each of which is clearly colour coded. First, is an introduction to the law which covers contracts generally. This is followed by sections dealing specifically with contracts of purchase, sale and supply, the Unfair Contract Terms Act and reservation of title clauses. A further section deals with miscellaneous legislation including the trade descriptions acts, consumer protection acts, Consumer Credit Act and Fair Trading Act. An appendix on product liability is very briefly covered, as another booklet in the series will subsequently deal with the subject.

As an introductory guide, this work should prove useful in outlining the basic points that need to be considered when arranging commercial contracts.

Exclusion clauses after the Unfair Contract Terms Act, by Richard Lawson. Oyez, 1978. xix, 140 pages; paperback, £5.00 (ISBN 0 85120 350 7).

Introducing the Unfair Contract Terms Act, by Alex Roney. What every businessman should know series. London Chamber of Commerce and Industry, 69 Cannon Street, London EC4N 5AB. 1978. 36 leaves; paperback £3.50.

Knowing your employment rights

Readable, practical guides to employment law are few and far between, so Tolley's employment handbook fills an important gap. It is designed to satisfy the wide variety of needs of those with an interest in employment – from the employer who wants to know his legal obligations, and the employee who is uncertain of his legal rights, to the trade unionist involved in a recognition dispute or the professional adviser confronted with a problem on employment law.

There are 52 sections in alphabetical order from accidents and safety measures to wrongful dismissal. Each section contains references to helpful official publications, relevant legislation and case law and internal cross-references. The text is readable yet concise and fulfils its claim to explain 'the complexities of the law in language you'll understand'. To aid quick reference all headings are clearly printed in thick type and paragraphs are numbered for rapid scanning. Altogether some 78 acts and over 100 cases are referred to in the text and an appendix sets out in full the Industrial Relations Code of Practice (1972) and the Acas code of practice nos. 1, 2 and 3.

The publishers propose to produce new editions of the handbook annually, or after any major changes in employment law, and these could well become invaluable sources of reference for all involved with the subject.

Tolley's employment handbook, by Elizabeth Slade. Tolley Publishing Co Ltd, 1978. xix, 254 pages; paperback £6.50 (ISBN 0 510 49352 1).

Towards economic salvation

Exponents of the main British schools of economic thought met at a conference organised by the National Institute of Economic and Social Research in December last year. Held at Birbeck College, London, it was the first in a series of conferences which have been organised to examine the important economic policy issues of the next decade.

The topic selected for this first meeting was 'demand management' and the papers have been reproduced and published for NIESR by Heinemann.

Discussion was concentrated initially on the management of UK economic policy during the period 1964 to 1981, with the period divided into three episodes: 1964-69, 1970-75 and 1977-81. Policies were suggested for each episode and their likely effects on prices, employment and the balance of payments were evaluated. The initial papers were later summarised and compared from various angles, including those of fiscal, counter-inflation and monetary policy.

The book also records the two days of detailed discussions which followed presentation of the papers, summarising the various points of view and offering criticism of past policies and some suggestions for our future economic salvation.

Demand management; edited by Michael Posner. National Institute of Economic and Social Research economic policy paper no. 1. Heinemann, 1978. x, 242 pages; hardback £9.50 (ISBN 0 435 84600 0); paperback £4.50 (ISBN 0 435 84601 9).

Prospects for product tankers

Fairplay Publications Ltd, well-known in the shipping industry for its weekly journal, has lately been producing a series of special reports on vessels involved in the bulk carriage of liquids by sea. Earlier reports covered LNG, LPG and chemical carriers and the latest and last in the series turns to product tankers.

In common with previous reports, it combines a survey of current information on the vessel type with a review of future prospects. The first part accordingly describes the development and structure of the petroleum products industry, and sets out the categories of materials produced by refineries, while part two concentrates on the vessels themselves, describing product tanker design, equipment and operations.

The final part builds up a picture of current and possible future demand for petroleum products, and draws out the implications in terms of prospects for the product tanker market. There is also a glossary, and appendices tabulating information on cargo characteristics, refinery capacities and vessels on order.

Product tankers and their market role, by Michael Corkhill. Fairplay Publications Ltd, Minster House, Arthur Street, London EC4R 9AX. 1978. 240 pages; ringbound £35.00 (ISBN 0 905045 06 8).

Publications and opinions expressed on this page do not necessarily reflect the views of the government. Inquiries and submissions for review should be sent to *Trade and Industry*, New Publications Page, Room LG 17A, 1 Victoria Street, London SW1H 0ET, tel. 01-215 4136.

Technology news

Teletext set fair for exploitation

Britain's electronics and communications industries have been urged by Alan Williams, Minister of State for Industry, to make the most of Britain's lead in the teletext information system and a potential world market of some 8 million teletext sets per year. Speaking on 20 September, Mr Williams opened national teletext week which was organised by the British Radio Equipment Manufacturing Association (Brema) to increase public awareness of this revolutionary electronics development.

A British invention, teletext is being put to practical use for the first time in the UK. The system enables continually up-dated news and information to be received on modified tv sets in the form of words, figures and diagrams.

Both Ceefax, the British Broadcasting Corporation's version, and Independent Television's Oracle are in operation now. The Post Office's Prestel, previously called viewdata, is undergoing a public trial prior to its launch in 1979. Unlike Ceefax and Oracle which are broadcast on existing tv channels, Prestel is transmitted over the telephone system.

Tv sets which can process the Ceefax and Oracle signals are available, as are also plug-in units which can be attached to existing tv sets. Businessmen are expected to be the greatest users initially of teletext as the extra cost is comparable to the price of a normal tv set. This is expected to drop dramatically as increasing use and volume production get underway.

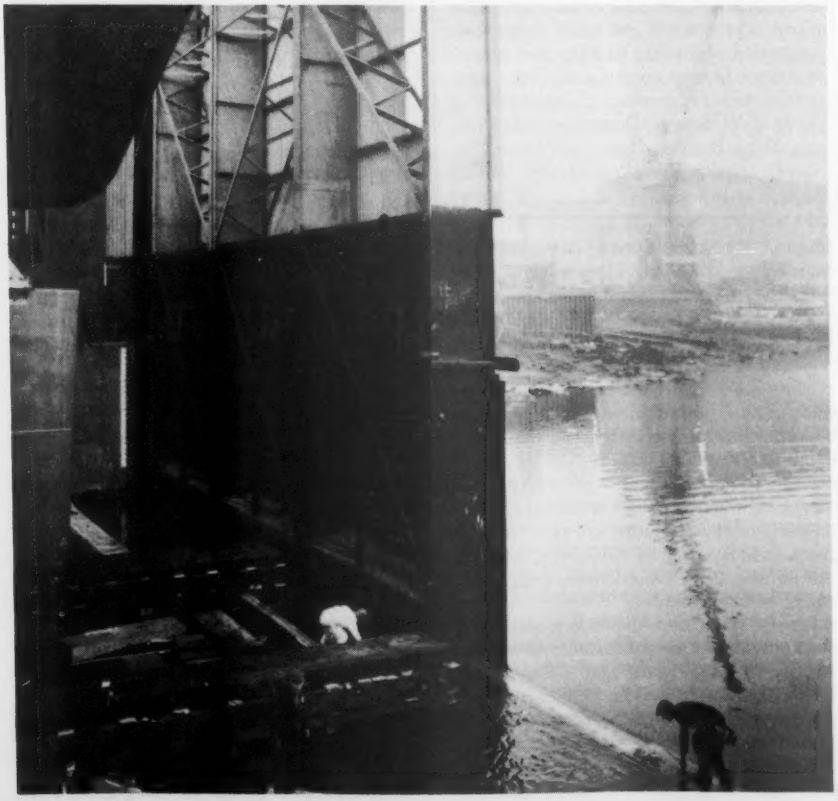
National teletext week was marked by advertising campaigns by tv set manufacturers and distributors and the broadcasting organisations to support point-of-sale promotions by dealers. An exhibition was mounted at Mullard House.

Government support

Mr Williams called on the broadcasting organisations and the Post Office to continue promoting teletext as strongly as possible. Set manufacturers were urged to move as quickly as possible towards the day when every tv set had a teletext facility. He stressed that the government stands ready to support any company which may be hesitating to take the necessary leap into the profitable future that teletext offers.

Floatpads help keep out water from shipbuilding berth

This 200-tonne sliding door to Austin and Pickersgill's new sloping shipbuilding berth at Southwick is supported by six 75-tonne capacity floatpad/jack units running on a smooth concrete track capped with stainless steel. Supplied by Glover Engineering (Mossley) Ltd, the bearing system is manufactured under licence to the Department of Industry's National Engineering Laboratory. Developed by the laboratory, floatpads are compliant bearings activated externally by grease under pressure. Loads of thousands of tonnes can be supported, moved and precisely located.



Sira to accelerate the use of microprocessors in process instrumentation

Recent rapid developments in microelectronics technology will lead to a new generation of process instrumentation. In response to this situation a major programme of work aimed at accelerating the use of microprocessors in process instrumentation has been initiated at Sira Institute Ltd. This development programme is being partially funded by the computers, systems and electronics requirements board of the Department of Industry, with a contribution of £40,000 for one year.

Over recent years, Sira has helped several companies develop microprocessor-based instruments. With the support provided by the Department of Industry, Sira has widened the scope of its existing microprocessor development work, carried out under confidential contracts with individual clients, to include more fundamental activities necessary in consideration of the problems described above.

The Sira programme is to tackle the task of applying microelectronics in process instrumentation by promoting the transfer of information on microprocessors in process instrumentation through conferences, seminars and training courses; by developing and providing new microelectronics-based instrumentation concepts by experimental applications work; and by providing specific assistance to individual companies under consultancy and development contracts.

The new instruments, it is predicted, will calibrate themselves, check they are functioning properly, and listen and talk to process operators and central computers over simple

communications systems. They will communicate in a language which uses directly meaningful terms and expresses quantities in true physical units rather than arbitrary signal levels. Further claims are made that the new generation of instruments will be more economic to manufacture, to install and to use. They will have greater application flexibility, being based upon standard hardware modules which are dedicated to particular applications merely by inserting a microelectronic chip containing the appropriate program.

There are several problems to overcome before the claimed new generation of instruments becomes a reality. It is generally predicted that the proportion of instrumentation implemented in digital form will rise from the present level of 15 per cent to a level of 50 per cent by the mid-eighties. If this prediction is to be realised, much work must be done in training instrumentation designers and engineers, and in establishing sound concepts and principles for the design of microelectronics-based instrumentation. A stable foundation must be laid to overcome the linked problems of process industry reluctance to adopt new and unproven instruments, and instrument manufacturer reluctance to develop new instruments which may meet with market resistance.

For further information on Sira's activities and services relating to microelectronics in process instrumentation, contact W. H. Simmonds or T. P. Flanagan, Sira Institute Ltd, South Hill, Chislehurst, Kent, tel. 01-467 2636.

Sira repeats course on microprocessors

Demand continues for the three-day course on 'Use of the microprocessor as a component in measurement and control equipment', organised jointly by Sira Institute Ltd and the Department of Industry's Warren Spring Laboratory. As a consequence, further repeats will be held in 1979 on 13 to 15 February at Warren Spring Laboratory, Stevenage, Hertfordshire, and on 22 to 24 May at the Sira laboratories at Chislehurst, Kent. The maximum number attending each course is limited to about 30 to facilitate discussion between participants and lecturers.

The programme is for designers; development, research, instrument and process control engineers; and chief engineers and technical managers concerned with industrial measurement and control. Participants will be expected to have an understanding of the basic principles of automatic control and computer programming, but prior knowledge of microprocessors will not be necessary

Further information may be obtained from Mrs R Keiller, Sira Institute Ltd, South Hill, Chislehurst, Kent BR7 5EH.

Savings for industry predicted from BOC R&D programme

A welding research and development programme costing more than £400,000 over the next three years, is to be undertaken by BOC Murex, Waltham Cross, part of BOC's engineering division. The investment will eventually produce significant savings for British industry and is being supported by £292,500 from the Department of Industry's engineering materials requirement board.

Main purpose of the research will be to study in much greater depth, the relationship, between consumable design and the fracture toughness of weld metal as used in the offshore, pressure vessel and power generation industries using the manual arc welding process. It is estimated that, initially, at least £3 million a year would be saved by industry, and possibly £10 million, if the results prove adaptable to other welding processes.

Present fabrication methods require costly precautionary techniques to meet the stringent certification standards laid down by the approval authorities. The BOC Murex programme will investigate the metallurgical properties of weld metal and the development of high-technology welding consumables to overcome the production delays that these methods create. Although the research programme has been designed around the manual electrode process the eventual spin-off in technology could have significant benefits for other welding processes.

Part of the three-year programme will involve the utilisation of the advanced research facilities and expertise of the Atomic Energy Research Establishment at Harwell, and the Welding Institute at Abington. Collaboration with some of the country's leading fabricators will ensure that the venture achieves the aim of keeping British manufacturers at the forefront of welding technology.

Support for R&D in industry

The Department of Industry spends some £50 million each year through its nine R&D requirements boards on technological support for industry. They encourage industry to undertake R&D projects on a joint funding basis, which ensures that there is a minimum delay before results are incorporated into products and processes. Where firms do not have a research department, the boards are prepared to help pay for work sub-contracted to other laboratories. The boards are currently looking for more industrial projects to support.

The engineering materials requirements board has group working parties on iron and steel, ferrous foundries, non-ferrous metals, polymers and composites, and ceramics and glass. Fields of work identified as likely to remain of national importance for the foreseeable future are materials and energy conservation; provision and establishment of substitutes for materials in decreasing supply; greater use of indigenous materials; and greater added value to exports. Point of contact is Dr L. M. T. Hopkin, Department of Industry, Abell House, John Islip Street, London SW1P 4LN, tel. 01-211 3560.

The computer systems and electronics requirements board has working groups on computing, electrical technology and control engineering. Technologies supported by the board are computing networks and data communication; realtime and distributed computing; computing system reliability and design; the application of microprocessors and other large-scale integrated electronic circuits; and instruments for process control and silicon integrated circuit technology. Point of contact is Mr C. W. Seager, Department of Industry, Dean Bradley House, 52 Horseferry Road, London SW1P 2AG, tel. 01-212 8056.

ECS moves nearer to the launch pad

Europe's own communications satellite has come a step closer, following the Post Office's backing for the Eutelsat project. As a result the way is clear for the next stage of discussions with the European Space Agency (ESA).

Eutelsat is the organisation set up by the telecommunication administrations of 17 European countries, including Britain, to manage the European communications satellite (ECS) project. The Post Office was the sixteenth administration to sign the agreement which divides the cost of the project among the countries taking part in it.

Each nation's share in Eutelsat is approximately equal to its estimated use of the satellite's capacity. Britain's share is 15 per cent, equal to that of France and together the largest contributors to the project. Only one further document remains to be signed to make ECS a reality. This is an agreement between Eutelsat and ESA under which the space agency will design, build and launch the satellites making up the ECS projects.

The first satellite, for which British Aerospace Dynamics Group is the prime contractor, is due to be launched in 1981 and will be used initially in trials of the services ECS will make possible. It will become operational when the second standby satellite, planned for 1983, is launched. The satellites will be in geo-stationary orbit 35 900 km above the equator, at a longitude of approximately 10 degrees east.

With its large capacity – handling up to 12 000 phone calls and two television pictures simultaneously – ECS will provide valuable alternative routes to parts of Europe, with high reliability. The project will help the Post Office cater for the continuing high growth in phone calls between Britain and Europe and enable it to meet the demand for new services in the future. It will also provide greatly-improved facilities for transmitting live tv programmes throughout Europe and the Mediterranean area.

In addition to carrying phone calls and tv pictures, ECS would permit the introduction of new very-high-speed data services, perhaps with rates up to 120 million bits per second. And it would also have the capability of providing telecommunication services for North Sea oil platforms beyond the range of the Post Office's present radio systems using tropospheric scatter.

The satellite will be of advanced design, using new techniques for handling phone calls,

and operating at much higher radio frequencies than those of present-day versions. To try out these new systems, Europe's orbital test satellite was launched in May and is operating successfully on station. A new all-British design of earth aerial to work to the satellite was recently handed over by Marconi Communications Systems Ltd at Goonhilly – the Post Office's satellite communications earth station in Cornwall.

Although this new aerial will be able to work with ECS as well as the test satellite, it is likely that for operational use another aerial will be built – at the Post Office's earth station at Madley, near Hereford.

Eutelsat, the telecommunications satellite organisation set up by the European administrations and operating agencies is, for the time being, provisional and its full title is 'Interim Eutelsat'. Its constitution, which came into force on 30 June 1977, allows all 26 members of the European Conference of Postal and Telecommunication (CEPT) administrations to be a party to it. So far, 17 administrations or operating agencies have become 'signatory parties'.

As a provisional organisation, Interim Eutelsat has no 'juridicial personality' and is therefore unable to enter into agreements or contracts until it becomes a definitive organisation in about 1980. For the time being, it assigns mandates to particular administrations to enter into agreements on its behalf.

ECS, designed for a seven-year life, is being specifically developed to handle intra-European telephony and the distribution of Eurovision programmes during the 1980s. It will allow for the interchange of telephony traffic between any two CEPT members – covering an area bounded by Iceland, Scandinavia, Finland, West Germany, Turkey, Portugal and the Atlantic Islands. The exchange of Eurovision programmes within the European broadcasting region also includes the European Broadcasting Union member countries in north Africa and the Middle East.

To meet the coverage requirements, the telephony area has been divided into three, each covered by a circular spotbeam transmitted by its own antenna. The spotbeams will illuminate east and west Europe and the Atlantic (Azores and Canary Islands). A fourth transmit antenna provides coverage of the entire European zone by an elliptical 'Eurobeam' and there is one receive antenna also covering the entire zone. Some 15 earth stations, with dish antenna of 16 to 19 metres diameter, are expected to be working to ECS by the mid-1980s, plus six tv-only earth stations with 13-metre diameter antennae.

Minicomputer monitors train times

The first phase of a computer-based train reporting and passenger information system, which monitors train times and controls the display of passenger information at stations, is now in operation on British Rail's southern region. This phase, costing £100,000, uses seven inter-linked Digico M16V minicomputers covering the three signal box areas centred on London Bridge, Dartford and Feltham, and will control indicators on 60 stations.

Work on a second phase to cover another 80 stations in the Victoria and Eastleigh (Southampton) areas, involving a further 14 M16E minicomputers, costing £250,000, has recently commenced. Further extension to include the Brighton, Guildford and Waterloo areas is envisaged.

Part of the system is located remote from the signal box, at Waterloo. Known as the master timetable system, this holds timetable information for use in conjunction with train movement information, communicated by the train describer, to report on the early or late running of trains and produce punctuality statistics. The timetable information is also used by the indicator systems, located in each signal box, to determine in conjunction with train movements the next indicator setting at each station.

The system provided at Waterloo consists of a 32 kilobyte word processor with disc backing store for programs and data, and an 8 kilobyte word front-end processor for control of message, routeing and communication protocols. Bulk data input is via paper tape, and visual display units are provided for amendment of stored timetable. The front-end processor controls the dissemination of timetable data to the indicator systems and receipt of train movement reports from the train describer systems, both via modem links.

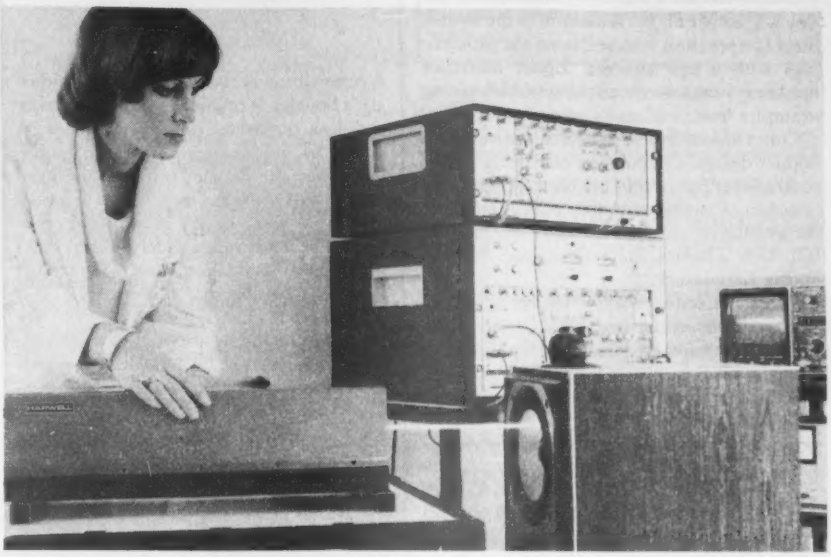
The input includes working timetables, permanent and temporary traffic amendments and daily special notices. This is merged with all timetable information published up to midday before the day of operation to form the 'running timetable' valid for the actual day of operation, which is generated by the system between 09.00 and midnight each day.

In each signal box, different combinations of software and hardware exist but, in essence, the Digico minicomputer fulfils two roles: communications back and forth to Waterloo and platform indicator control. The network communications processor at the signal box controls communications, prepares message protocols, filters messages and acts as a message switching centre for its particular location.

The software has two roles: to store timetable data and set indicators accordingly and, on the approach of a train, to check the displayed information and amend if necessary. The system is designed to store on a 24-hour timetable, achieved by a comprehensive system of bit packing.

Forming the basis of Digico systems, the M16E minicomputer is a 16-bit parallel mode machine with a 360 nanosecond access memory. Standard features include automatic bootstrap, mains fail detect/automatic restart, multi-level interrupt, direct access memory, memory partitioning and real time clock. The metal-oxide semiconductor memory is expandable from 16 kilobytes in increments of 16 and 32 kilobytes up to 2000 kilobytes.

Loudspeaker vibrations measured by laser beam



This Harwell laser interferometer being beamed onto a bass/mid-range loudspeaker unit at B and W Loudspeakers Ltd assists in determining the relative output of different portions of the diaphragm. It provides the only method known to the company of measuring precisely the vibration of the drive units without interrupting their performance. The laser interferometer is one of the prototypes made at the Non-destructive Testing Centre at the Atomic Energy Research Establishment, Harwell.

Materials handling seminar to be held in west country

The last seminar in the series entitled 'Bulk materials handling – new technology solves the problems', organised by the Department of Industry's committee for materials handling in conjunction with the department's Warren Spring Laboratory, will be held on 6 December at the Dragonara Hotel, Bristol.

The seminar is for people responsible for the planning, design, installation and operation of bulk materials handling systems, and is

intended to increase companies' awareness of current techniques and design, both for individual items of plant and for complete bulk materials handling systems. Chairman for the day will be Mr H. N. Wilkinson of the British Steel Corporation who will open the proceedings with a talk entitled 'Better materials handling – improvements are possible', giving examples from iron and steelworks.

Other topics are 'a practical approach to hopper design', 'pneumatic conveying of dry particulates', 'materials handling systems and selection of equipment' and 'bulk handling – recognising the pitfalls'. Speakers will be from ICI Ltd, Thames Polytechnic and Warren Spring Laboratory.

The seminar fee is £10 inclusive of coffee, lunch, afternoon tea and VAT, and further details can be obtained from Mrs G. R. Fuller, Department of Industry, Room 525, Ashdown House, 123 Victoria Street, London SW1E 6RB, tel. 01-212 8979.

China joins international standards body

China has joined the International Organisation for Standardisation (ISO). Bringing the number of countries represented to 86, they now account for all but a small fraction of the world's gross national product.

The People's Republic of China is represented by the China Association for Standardisation (CAS), which is responsible for organising and conducting research for other activities for standardisation throughout the country. With the active participation of the members of CAS, over 2000 national standards relating to industrial and agricultural products and construction projects, more than 10 000 national standards relating to drugs, and about 10 000 ministerial standards have been established in China.

ISO has its headquarters in Geneva. More than 154 main technical committees and over 1800 working parties are involved in the work of preparing international standards, over 3600 of which have now been published. The UK is represented by the British Standards Institution.

Preventive medicine for machines at London conference . . .

Machines have healthy conditions and life expectations which can be assessed. And just like humans, their life and performance can be maintained by proper diagnostic attention – by periodically planned checks; by listening to their noises; feeling their vibrations; measuring their performance; and checking their fluid.

This comment was made by Dr Ralph Collacott, director of the UK Mechanical Health Monitoring Group who will be the opening speaker at the 'Second national conference on condition monitoring', which takes place at the Royal Lancaster Hotel in London on 27 and 28 February 1979.

Sponsored by the British Council of Maintenance Associations, the National Terotechnology Centre, and the UK Mechanical Health Monitoring Group, the programme takes 'simplicity and sophistication' as its themes on day one, and will cover 'neglected areas of application' on day two. A display of relevant equipment and techniques will accompany the conference and space is still available.

Technical services for industry

A new edition of the Department of Industry's booklet 'Technical services for industry' was published on 19 September. A guide to public-sector research establishments, the booklet provides the most appropriate source of information or assistance for a wide variety of technical problems. The fields range widely – from socks to satellites – and take in most of the sectors vital to technology-based industry.

More than 150 research facilities are described including those of nine government departments, 36 industrial research associations and four research councils. The research activities, available services and publications of each laboratory are given as well as points of contact. In addition, details of related information and other services are given.

Designed primarily for information scientists, industrial liaison officers, consultants and others concerned with problem-solving in industry, a comprehensive index of both subjects and organisations is provided.

'Technical services for industry 1977' is available without charge from the Technology Reports Centre, Orpington, Kent BR5 3RF, tel. Orpington 32111 ext. 246 or any Department of Industry regional office.

. . . and an international conference on interfaces

Substantial savings may be achieved by applying the principles of terotechnology, and in May 1979, the National Terotechnology Centre is sponsoring the 'First international conference on terotechnology', at the Cafe Royal in London.

Terotechnology is about the management of life-cycle costing procedures in a company, and involves multi-functional understanding and collaboration to be effective. It does not involve new disciplines, but it does represent a new concept: the integrated or systems application of existing knowledge. It is a multi-disciplinary approach which can only work if the engineer, accountant, and all the other specialists within an enterprise are involved at the appropriate time during acquisition of assets or manufacture of the products.

Under the general concept of 'interdisciplinary techniques', day one of the conference will cover reliability, maintainability, specification, project management, and functional cost analysis. Specialists need to have a broad recognition of their own contribution plus that of their colleagues in other disciplines. Day two will examine 'interfaces' in great detail, and delegates will have the opportunity to form small working groups and discuss areas such as maintenance, quality, design, cost, production, marketing, purchasing and specification.

On day three, management involvement and motivation will be heavily outlined, and the conference will close with a formal Oxford debate, the motion of which will be that 'industry needs a terotechnologist'.

Speakers from the UK, Europe, America and Japan will participate in the international conference, and further details of both the above conferences may be obtained from Conference Communication, Monks Hill, Tilford, Farnham, Surrey, GU10 2AJ, tel. Runfold 2066 or 3111.

Wave energy conference to look at practicalities

Practical problems of extracting energy from sea waves will be discussed at length at the first UK wave energy conference, to be sponsored by the Department of Energy. The conference, which is being run by the department's Energy Technology Support Unit at Harwell, takes place in London at the Heathrow Hotel on 22 and 23 November.

Papers will be based on research carried out during the first phase of the government's wave energy programme. But strong emphasis is also being laid on the tremendous challenges to engineers that building sizeable wavepower installations would pose. The conference will provide an opportunity for promoting contacts between the specialists already working in the field and those from industry generally who could have a major interest as the programme progresses.

The wave energy programme was launched in 1976 by the Department of Energy. The first phase of the programme ends in October 1978, but the programme is to continue with an expanded budget. The conference seeks to attract top-level engineers in all the fields that would be involved in building a full-scale demonstration project. A large demonstration programme would present major problems of manufacture, mooring and maintenance, as well as power generation, in extremely hostile conditions.

Cost, including accommodation and all meals, will be £150. Further details about the conference can be obtained from Mr P. J. Quarrell, Wave Energy Conference Office, Building 10.28, Harwell, Oxfordshire, 0X11 0RA, tel. 0235 24141 ext. 2536 or 2738.

Finance for technology

The National Research Development Corporation provides financial and other support for technological developments of potential commercial importance. NRDC promotes the adoption by industry of new products and processes invented in government laboratories, universities and elsewhere. Further details are available from the National Research Development Corporation, Kingsgate House, 66-74 Victoria Street, London SW1.

New products

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Tough CAT pin-points hidden cables

As reliable and easy to use as a pick or shovel and tough enough to be treated like one is the claim for the new Radiodetection 1305 cable avoiding tool (CAT), launched by Electrolocation Ltd of Bristol.

The CAT can detect more cables than any of the conventional cable locators now available, says the company, because it has two search modes. The 'power' search mode detects live loaded electric cables while the 'radio frequency' search mode detects main power or telephone cables, either live or dead, and not radiating a detectable 50 Hz signal. In either mode, the CAT gives a warning 'growl' when it detects a cable.

The purpose of the tool, says the company, is to extend the advantages of its sub-surface surveying technology to small or emergency excavations. In such situations, workmen rarely have the time or technical background to use sophisticated electronic detection equipment. The CAT is designed to provide them with a simple and reliable safety tool to help prevent personal injury, or damage to buried plant.

The key to the tool's toughness lies in the weatherproof, rotationally moulded, monobloc polyethylene housing. Within this custom-built protective shell, all components are locked in polyurethane plastic foam to avoid any damage from shocks or vibration. The printed circuit board is fitted in a sealed compartment with an anti-condensation desiccant. The unit weighs only 3 kg overall and has only three controls, an on/off trigger, a signal level control and a function selector.

A ganger on a North Thames Gas pipeline project using the CAT.

The CAT's output consists of simple distinctive tones emitted from a loudspeaker in the top of the housing. The loudspeaker unit is equipped with a coil-flex, and may be unscrewed and held to the ear if conditions are very noisy, for example, near heavy traffic or pneumatic road drills.

With the tool held comfortably with the base just above ground level, the proposed excavation area is swept in a grid pattern – first with the function switch set to 'power' and then with it set to the 'radio-frequency' mode. Grid sweeps over the site will locate the position of almost all buried cables (and other conductors) allowing the excavation to be made in greater safety and with greater economy. Further checks can be made in the excavation trench as work progresses to verify and pinpoint the presence of any cables buried more deeply.

The performance specification of the CAT states that in 'good' conditions it will detect cables to depths of 3 m in both power and rf modes with a plan accuracy, as a percentage of depth, of ± 5 per cent. In 'poor' conditions, these figures are reduced to 2 m with an accuracy of ± 10 per cent.

Further information: circle 174

Video monitor miniaturised

After nine months' evaluation trials in a variety of international security, military, broadcasting and industrial applications Sinclair Radionics Ltd's MON 1A, 50 mm video monitor is now in production.

The unit can be used in a variety of applications, including: as a service monitor for installation and maintenance of closed-circuit tv systems; a viewfinder/sight for video cameras; a video console cue and vtr replay monitor; or for portable data terminals.

The MON 1A is a self-contained portable unit with steel case and rechargeable nickel cadmium batteries which provide around four hours' continuous viewing. There is a choice of external power input, 6V dc, 12V dc or ac mains via adaptor. A panel-mounted version for equipment manufacturers is available, without case or batteries, which requires a 5V dc power input.

The monitor is based on proven circuit techniques from the Sinclair microvision pocket tv. A small, rugged, lightweight unit, it measures 42 × 103 × 176 mm and weighs only 680 g. It has very low power consumption, typically 600 mW and features 525 or 625 line operation and regulated eht. The monitor accepts a standard 1V composite video input in a switched 75 ohm terminated or high impedance bridging mode. For normal video use, the display has a typical resolution of 325 lines and for data applications it can resolve up to 40 characters per line, 24 lines.

Further information: circle 175

Window shutters prevent heat loss more efficiently

Insulated window shutters are claimed by Thermoblind Insulated Window Shutters Ltd to be markedly more efficient than double glazing in preventing heat loss and can also serve as an effective barrier against solar heat. The manufacturers say that the shutters, with their U-value comparable to that of an external wall, can save up to 65 per cent of heat lost through double glazing and up to 82 per cent of that lost through single glazing. Time required for the shutters to lose the amount of heat that would be lost in one hour through double glazing and single glazing is about 2.9 hours and 5.6 hours respectively.

Shutters are unobtrusive, and easy to install and use. They comprise two sections, each made up of linked panels mounted internally on either side of the window. On windows higher than about 1.85 m there is also a track mounting at the top. Each panel consists of a core of polyisocyanurate foam – the most efficient thermal insulant in industrial use – sandwiched between sheets of steel, plastics, timber, fabric, laminates or any other suitable material. A shutter with a 13 mm core has a U-value of 0.9 W/m²/°C for windows with 6 mm thick glass and an airspace of 20 mm between glass and shutter.

Further information: circle 176

Road haulage service company launched

Bulk buying, overnight security parks, driver accommodation, repair and servicing facilities and warehousing for road hauliers are to be provided by Road Operators Associated Delivery Services Ltd (Roads). Formed by some members of the Road Haulage Association, this new company has so far acquired 40 shareholding members from all over the country.

Roads will be carrying out any activity allied to the haulage industry, including traffic offices, customer advisory services and consultancy. It will engage in bulk buying of fuel, tyres, spares and even vehicles and trailers for its members. Finance and insurance will be arranged. Land will be purchased for the development of overnight security lorry parks, having workshop facilities and driver accommodation for long distance and international operators.

Long-term business has already been secured and placed with individual members. Negotiations are progressing with a large group of food distributors and also with the planners of a service area in Berkshire.

Further information: circle 177

Overseas trade news

ECGD guarantees further loan for Polish tractor project

The repayment and funding for a $220 million project line of credit which Barclays Bank International Ltd, acting on behalf of a syndicate of banks, has made available to Bank Handlowy w Warszawie SA of Poland is being guaranteed by the Export Credits Guarantee Department.

The loan will help finance contracts awarded by Metalexport of Poland to Massey-Ferguson Perkins and to other UK companies nominated by Metalexport, for capital plant and equipment and components for the Ursus Tractor Project, started in 1974 to modernise Poland's tractor and diesel engine industries.

To qualify under the terms of the loan, contracts must have a minimum value of $200,000. Contracts for plant and equipment must be placed by 31 December 1981, and those for components by 31 December 1983.

This is the third ECGD guaranteed loan which Barclays Bank group has arranged for the Ursus project. The first loan for £127 million, signed in September 1974, was at that time the largest ever loan to be backed by ECGD. A second loan of £31 million to help finance equipment and components to build Perkins diesel engines at the Andrychow plant, south Poland was signed in November 1975.

Leicester chamber plans 1979 missions

Leicester and County chamber of commerce has arranged its programme of overseas selling missions for 1979.

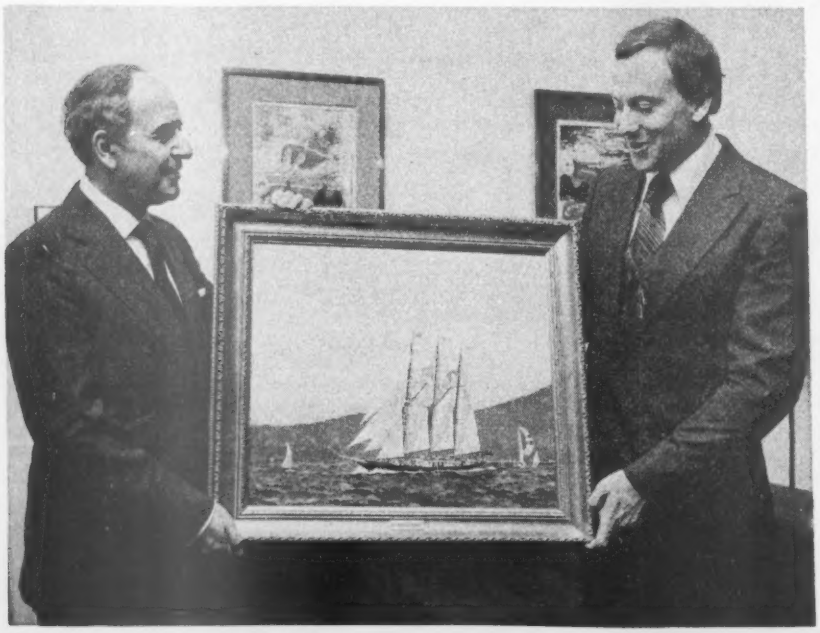
The programme opens with a week's visit to Iran in February, which is followed by what has now become an annual visit to Nigeria in March. A third Opec country, Saudi Arabia, will be the destination for a mission which will be away at the end of April but for the rest of the year, the chamber will concentrate on more traditional markets for Leicester products.

Visits will be made to the west coast of the United States (the time still to be arranged), to South Africa in June, Singapore in September, and Kenya and Tanzania in November.

In addition, the annual mission to Moscow, which will be the seventeenth consecutive visit since the series began in 1963, will take place in September.

Canadian store values BOTB assistance

Sir Derek Ezra, member of the British Overseas Trade Board (left), receives on 21 September a painting of the Sail Training Association's Schooner 'Sir Winston Churchill' from Mike Davies of Arden Management Ltd, Vancouver (right). The painting – by Vancouver artist Mary Harrower – was presented to the British Overseas Trade Board by Woodward Stores Ltd in appreciation of the substantial support the board gave the store for its British food promotion 'A Taste of Britain', from 26 June to 12 August.



Seminar on what the US buyer expects

A half-day seminar on 'what the US buyer expects' is to be held at the London Chamber of Commerce and Industry on 17 October under the chairmanship of Lord James Crichton-Stuart of Coutts and Co, chairman of the chamber's north American committee.

Too often, the chamber says, it seems that British businessmen mentally weigh up the obvious attraction of the prosperous United States market for products they know they can sell against the problems they believe exist in becoming established there – and decide against making a total committment.

Approach to the buyer

Among the considerations a company must make is the right approach to the US buyer, and an understanding of what he needs, how he thinks, and how he operates in the intensely competitive climate he regards as second nature. It is to cover this subject that the London chamber has designed this seminar for the UK's most important and largest trading partner, with the exception of the EEC.

Emphasis on one sector

The programme has been directed to achieve practical benefits and specific objectives. For this reason, the emphasis has been put on just one market sector – luxury and leisure goods – allied to just one geographic trade area of considerable new wealth, the south-eastern states. The basic principles, however, will have wide application to many other types of product and areas.

The key talk on what the US buyer expects will be given by Mr J. Keith Harwood, managing director of the UK and Irish offices, of R. H. Macy and Co, the world-famous department store.

Other authoritative speakers will cover essential pricing and marketing policies, and getting goods to and through the US. The European chief of the Georgia department of Industry and Trade will focus on the huge demand for luxury and leisure goods in both his own and neighbouring states.

The morning seminar will conclude with a buffet lunch for delegates at an all-inclusive cost of £12.96 for members of the north American section of the chamber and £16.20 for non-members, VAT included.

Full details

Brochures and full details can be obtained from Miss Barbara Hallamore at the London Chamber of Commerce, 69 Cannon Street, London EC4, tel. 01-248 4444 ext. 34.

(Continued on page 719)

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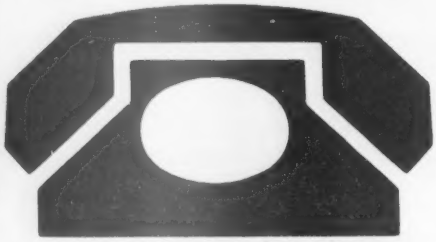
OTAR: help for exporters

Overseas Tariffs and Regulations Section (OTAR), Export Services and Promotions Division, Department of Trade, Export House, 50 Ludgate Hill, London EC4M 7HU (tel. 01-248 5757) can give you directly, or through your regional office, up-to-date information on the tariffs and customs regulations of overseas countries, import licensing regulations and restrictions including import quotas; certificate of origin; consular invoices and fees; labelling and marking requirements; foodstuffs, drugs and pharmaceuticals; agency legislation, setting up of a subsidiary company and the imports of samples. It also provides information, in collaboration with the Ministry of Agriculture, Fisheries and Food, on health regulations for livestocks meat, animal products and plants and seeds. In short, OTAR can help on almost all legislation which affects the entry of British goods into overseas countries.

Inquiries which concern the countries of more than one sub-section (excluding inquiries involving only EEC countries) should be made to OTAR's co-ordination sub-section on 01-248 5757 extension 452 or 454.

For information on specific countries, phone the number and extension given below



01-248 5757

extension

Sub-section A

1 Co-ordination of EEC regulations, requirements and common customs tariff (CCT), Denmark, France incl. overseas territories, Greece, Turkey, Cyprus

405 Denmark (incl. Faroe Islands and Greenland). EEC legislation on tariff and non-tariff barriers relative to community trade

423 France and French overseas departments, French overseas territories, Comoros

439 Greece (incl. Dodecanese Islands), Turkey, Cyprus

2 Benelux, Dutch overseas territories, Irish Republic, Italy, Federal Republic of Germany

288 Belgium, Luxembourg, Netherlands, Netherlands Antilles, Aruba, Bonaire, Curacao, St Eustatius, St Martin (Dutch), Saba, Suriname

466 Italy, Irish Republic

467 Federal Republic of Germany

Sub-section B

Efta countries, Spain, Gibraltar, Malta, Israel, Macao

458 Israel, Norway, Gibraltar, Malta

459 Austria, Sweden, Switzerland

460 Portugal, Finland, Iceland, Macao

461 Spain, Canary Islands, Andorra

Sub-section C

1 North America, Bahamas, Bermuda, West Indies

455 Canada

456 USA (incl. Alaska, Caroline Islands, Guam, Hawaii, Mariana Islands, Marshall Islands, Panama Canal Zone, Puerto Rico, Samoa (US), Virgin Islands (US), Wake Island)

7312 Anguilla, Antigua, Bahamas, Barbados, Belize, Bermuda, British Virgin Islands, Cayman Islands, Dominica, Grenada, Guyana, Jamaica, Montserrat, St Kitts/Nevis, St Lucia, St Vincent, Trinidad and Tobago, Turks and Caicos Islands

2 South and Central America

474 Argentina, British Antarctic Territories and Antarctica, Cuba, Dominican Republic, Falkland Islands, Haiti, Paraguay, Uruguay, Bolivia, Chile, Colombia, Ecuador, Peru, Venezuela

476 Brazil, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama

Sub-section D

Africa

462 Algeria, Ceuta and Melilla, Egypt, Equatorial Guinea, Libya, Morocco, Sudan, Tunisia, Western Sahara

471 Angola, Cape Verde, Guinea-Bissau, Jibuti (Djibouti), Malawi, Mauritius, Mozambique, Rwanda, St Helena and Tristan da Cunha and Ascension Islands, Sao Tome/Principe, Seychelles, Somalia, South Africa (with Botswana, Lesotho, SW Africa and Swaziland), Zambia, British Indian Ocean Territory

472 Benin, Burundi, Cameroon, Central African Empire, Chad, Congo (Brazzaville), Ethiopia, Gabon, Ghana, Guinea, Ivory Coast, Kenya, Madagascar, Mali, Mauritania, Niger, Senegal, Tanzania, Togo, Uganda, Upper Volta, Zaire

473 The Gambia, Liberia, Nigeria, Rhodesia, Sierra Leone

Sub-section E

Australasia and South East Asia, Eastern Bloc, China, Mongolia, Yugoslavia

401 New Zealand, Singapore, Thailand, W. Samoa, Chatham Islands, Cook Islands, Niue Islands, Tokelau Islands, Philippines

468 Australia, Solomon Islands, Cocos (Keeling) Islands, Christmas Island (Indian Ocean), Nauru, New Hebrides, Papua New Guinea, Albania, Bulgaria, Czechoslovakia, German Democratic Republic, Hungary, Poland, Romania, USSR, China, Mongolia, Yugoslavia

469 Brunei, Fiji, Hong Kong, Indonesia, Malaysia, Tonga, Gilbert Islands (incl. Ocean Island, Phoenix and Northern Line Islands), Tuvalu, Norfolk Island, Pitcairn Island

Sub-section F

Middle East (Part) and Asia (Part)

420 Afghanistan, Bangladesh, Burma, India, Nepal, Pakistan, Japan, Korea Democratic Peoples Republic, Korea Republic of, Sri Lanka, Taiwan, Yemen Arab Republic, Yemen Peoples Democratic Republic

475 Iraq, Jordan, Kampuchea (formerly Cambodia), Kuwait, Laos, Lebanon, Vietnam Socialist Republic of, Bahrain, Iran, Oman, Qatar, Saudi Arabia, Syria, United Arab Emirates

Exports of non-alloy ferrous scrap

The existing arrangments for the issue of licenses for the export of non-alloy ferrous scrap to countries outside the European community are to be revised.

The revised arrangements, which are intended to operate in the first instance to 31 December but which will be subject to review in the light of experience, are as follows:

Applications for licences to export low grade and fragmentised scrap will be considered from all exporters providing evidence of firm orders but there will be a limit of 20 per cent for high-grade scrap. The following types are treated as low-grade or fragmentised scrap, and high-grade scrap covers all other non-alloy ferrous scrap:

- ☐ Compressed baled material, other than compressed unused sheet and sheet cuttings
- ☐ Loose used wrought material containing 90 per cent or more, by weight, of a material of a thickness not exceeding 3 mm
- ☐ Turnings and borings
- ☐ Fragmentised used wrought material.

If there is evidence that licences for low-grade and fragmentised scrap are being requested merely as a means of securing high grade licences, and thus circumventing the objective of reducing levels of high-grade scrap exports, then it may be necessary to further restrict the high-grade element of individual licence applications.

Licences will be valid for a period of not more than two months and will be issued according to the arrangements outlined above.

Applications should be made to the Department of Trade, export licensing branch. These should give details of the intended shipments and supporting documentary evidence (in English) of the order. Telex messages giving full details will be accepted but must be followed within not more than two weeks by written confirmation of the order.

Exporters will be required to report to the Department of Industry, Iron and Steel Division, Room 821, Ashdown House, 123 Victoria Street, London SW1E 6RB, by not later than the sixth day of each month, exports made against such licences in the preceding calendar month.

Trade inquiries should be addressed to the Department of Trade, Export Licensing Branch, Sanctuary Buildings, 16/20 Great Smith Street, London SW1P 3DB.

Aid for Dacca airport facilities

Bangladesh will receive a grant of £390,000 from the Ministry of Overseas Development for aviation refuelling facilities at the new Kurmitola airport at Dacca. The grant will be used to buy storage tanks of 300 000 gallons capacity, refuellers, and fuelling and quality control equipment from British suppliers.

The aviation fuelling complex is an essential part in the construction of this new international airport, which will make a useful contribution to Bangladesh's balance of payments position. The new equipment is expected to meet requirements for the first four years of operation. The goods will be supplied through the Crown Agents.

Alan Williams visits BOC at Skelmersdale

To mark the fifth anniversary of BOC's £5 million investment in Skelmersdale, Alan Williams, Minister of State at the Department of Industry visited the works on 15 September. Here the minister is 'signing off' an export consignment representing £4 million of export orders despatched from Skelmersdale so far in 1978.

British supplement in Hungarian economic newspaper

Világgazdaság (World Economy) the Hungarian economic and commercial daily newspaper, is preparing a British supplement to be published at the end of November or early December.

This newspaper is particularly well informed and read by all leading industrialists and commercial decision-takers in Hungary.

The supplement will take the form of editorial material from both Hungarian and British contributors and paid advertising space.

The editors also have in mind that block advertising bookings by such bodies as chambers of commerce or trade associations would carry with them the right to accompanying editorial space.

An editor of the newspaper and a senior manager of the Hungarian advertising agency, Mahir, will be visiting Britain in October and will be glad to discuss details.

In the meantime, further information can be obtained from Istvan Kádas of the Hungarian embassy in London, tel. 01-235 8767 or David Redfern, Redfern Advertising, 37 Fleet Lane, London EC4, tel. 01-248 9201).

Comet report on the YAR

A report entitled 'Market opportunities, and methods of doing business in the YAR' has been published by the Committee for Middle East Trade (Comet). It has been written to help British exporters looking for the first time at this rapidly growing market.

Copies are available, price £6, plus 50p packing and postage from Committee for Middle East Trade, 33 Bury Street, St James, London SW1Y 6AX, tel. 01-839 1170/1191.

Have you a good industrial news picture?

Pictures are published in *Trade and Industry* each week showing developments in British industry. If your company has introduced an interesting new product, if you have received an award, if you have developed a novel manufacturing process, if you have produced the biggest or smallest or heaviest or (you feel) the best designed product, you are welcome to send us a photograph with a short news story. Contributions should be sent promptly – while the subject is still newsworthy – to the Editor, *Trade and Industry*, Room 439, 1 Victoria Street, London SW1H 0ET.

Get on the road to sell

To those unfamiliar with the market, Pakistan may not at first sight seem a very bright prospect. A per capita income of about $200 and a chronic shortage of foreign exchange would appear to be unlikely ingredients for a worthwhile export market. But Britain exported goods worth £121 million to Pakistan in 1977 – an increase of over 30 per cent on the 1976 figure. And, as a country in the top 45 markets for British exporters, Pakistan should attract greater attention from British exporters than it does. Bernard Bull, consul (commercial), Karachi, and Colin Reynolds, first secretary (commercial), Islamabad, explain why.

Pakistan is an agricultural country, with almost 60 per cent of its labour force engaged in agriculture and about 75 per cent of the total population of 75 million living in rural areas. The output of this sector has expanded over the years, but a population growth of about 3 per cent annually exerts continuous pressure for a sustained increase in food production.

Agriculture contributes over one-third of gnp and about 40 per cent of export earnings. Wheat, rice, cotton and sugarcane are the major crops. Cotton products and rice are important foreign exchange earners, although their contribution fluctuates according to the size of the crops and the level of international demand. Livestock accounts for about one-quarter of agricultural output (with beef and milk, poultry, meat and eggs the main products) and fisheries about 1 per cent.

Measures have been taken to increase the use of fertilisers and improved seeds, to encourage greater mechanisation and to expand agricultural research, education and field services. Credit for agricultural purposes is now obtainable more easily and procurement prices have been set at levels intended to increase output. At the same time, soil conservation, water logging and salinity control programmes, supplemented by land ownership reforms, have sought to increase the acreage under cultivation.

Pakistan's two principal cities are Karachi – 5 million, the only major port and the location of the majority of importers/distributors, and Lahore – 3 million, the main commercial centre of north Pakistan and an important industrial centre.

The capital, Islamabad, with a population of about 300 000 is largely an administrative centre. The urban population of Pakistan is increasing and the level of demand for the sort of product that Britain can supply is therefore likely to increase.

Industrial sector

Industry accounts for about 15 per cent of gdp and produces a wide range of consumer goods and such capital goods as road rollers, some sugar mill machinery, textile machinery and some machine tools. Many more items are assembled locally. In 1972, nationalisation led to the setting up of state corporations engaged in both manufacturing and service industries, including the production of vegetable ghee, petroleum and fertiliser retailing, commercial banking, life insurance and shipping.

Investment in the public corporations amounted to $309 million in 1976-77. Investment in the private sector has been encouraged by the offer of reduced interest rates, tax reliefs and tax holidays for products sited in certain areas. As a result, private sector investment increased substantially in 1977-78 over the preceding year.

British investment in manufacturing, much of it long-established, includes the production of paints, chemicals, pharmaceuticals, foodstuffs, and electrical equipment. This is profitable investment and there is a number of plans to expand capacity. There is significant British investment in trading, banking, insurance and building construction and, overall, Britain has the largest share of foreign investment in Pakistan. Profits from foreign investment can, and have been, freely remittable overseas and there is little doubt that, with the right products, local manufacture or assembly can be profitable.

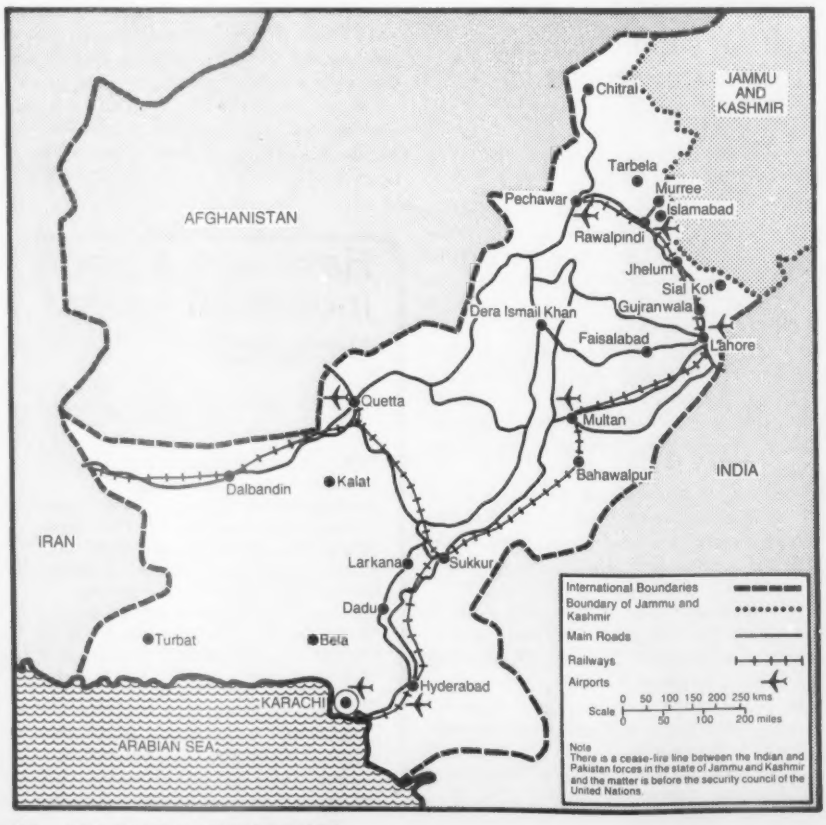
Future investment

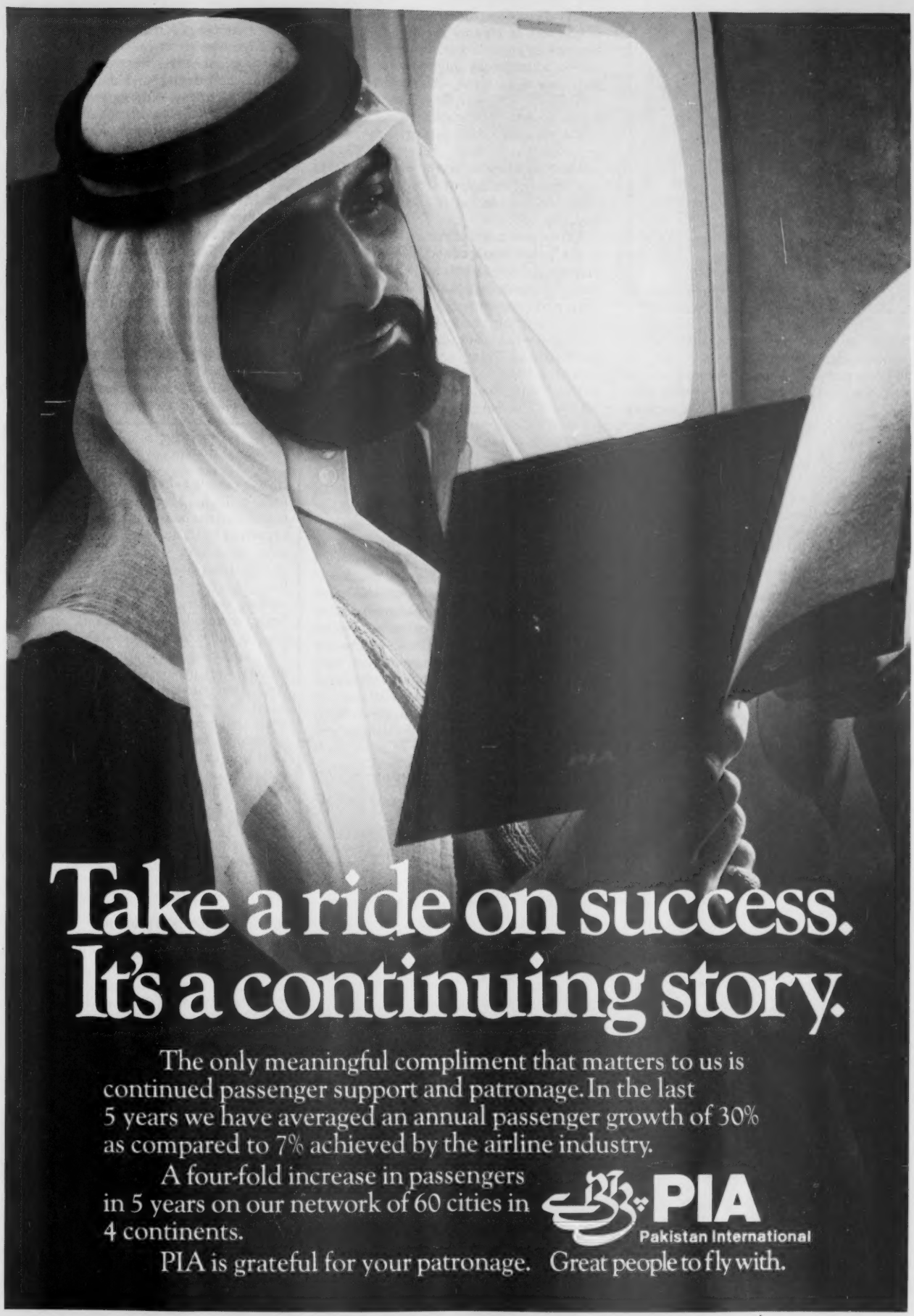
Indications of the direction of future investment spending and the level of private sector investment are set out in the budget (the fiscal year July 1978 to June 1979) and the five-year plan (1978-83). The principal allocations of development expenditure in the budget are to industry ($449 million, of which $300 million are for the Karachi steel mill), transport and communications ($332 million, divided between railways, ports, telecommunications, roads and airports), power ($347 million, with generation taking the largest slice and transmission grid station and village electrification receiving the balance), water ($256 million, including major water control/irrigation on the Indus and tributaries, with smaller amounts for waterlogging and salinity control and the tubewell programme), and agriculture ($128 million, mainly for fertiliser subsidies).

The main focus of the five-year plan is the development of agriculture. An annual expansion of 2.5 per cent in the irrigated cropped acreage and a 4 per cent increase in yields per acre are planned. This will call for a doubling, over the plan period, of fertiliser use, an increase in the tractor population from 71 000 to about 111 000 and other changes including improved advisory services. In the industrial sector, the Karachi steel mill, fertiliser plants and cement factories now under construction are to be completed, and the only new major project provided for in the plan period is a Pakistan Tractor Corporation-Massey Ferguson joint venture for tractor manufacture, with an annual capacity of 10 000 tractors. An active role is envisaged for the private sector and industrial growth is projected at 10 per cent annually in the public and private sectors.

Much of the investment plans depends on overseas aid – of the $1,900 million budgeted for development in 1977-78, foreign aid is expected to account for $1,213 million. The chief source of aid includes the major western

PAKISTAN





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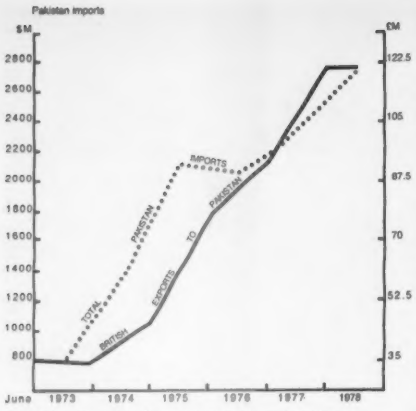


Source: Pakistan Economic Survey 1977-78. UK statistics are derived from the Overseas Trade Statistics.

industrialised countries which have formed aid-to-Pakistan consortium (UK aid disbursement in 1978-79 will be some £25 million, increasing appreciably in the following year), the World Bank, the Asian Development Bank, USSR, Saudi Arabia, the Opec fund and the Islamic Development Bank.

Much of this aid is tied, but British suppliers have opportunities for tendering projects using untied funds such as those provided by the World Bank. These opportunities are regularly publicised by the Department of Trade's Export Intelligence Service.

Export methods

All business in Pakistan is conducted in English and Pakistan firms are entirely familiar with English business methods. Nonetheless, the most usual method of exporting to Pakistan is through local importers/distributors and/or commission/indenting agents. Good distributors are often hard to find, particularly those capable of offering a comprehensive after-sales service but, for all practical purposes, the services of a local agent of one sort or another are desirable. Direct business is possible but, in most cases, the market potential can only be realised with the assistance of an agent, who needs to be supported with a regular flow of product information and frequent visits.

The old adage about getting on the road in order to sell applies very much in this market, and it cannot be too strongly emphasised that representation cannot be carried out from India or, indeed, anywhere else outside Pakistan.

A large proportion of Pakistan's imports are to the public sector. In spite of the severe shortage of foreign exchange, federal and provincial government departments and the quasi-governmental organisations, such as the state-owned corporations of the Board of Industrial Management, Pakistan Railways, the Water and Power Development Authority (Wapda), and the Pakistan Industrial Development Corporation, are all major importers. British exporters to this sector should familiarise themselves not only with the wide range of state-managed organisations, but also their potential requirements, against the day that foreign exchange is made available. To state the obvious, perhaps, a good agent and regular visits are two prerequisites which help to lead to public sector business.

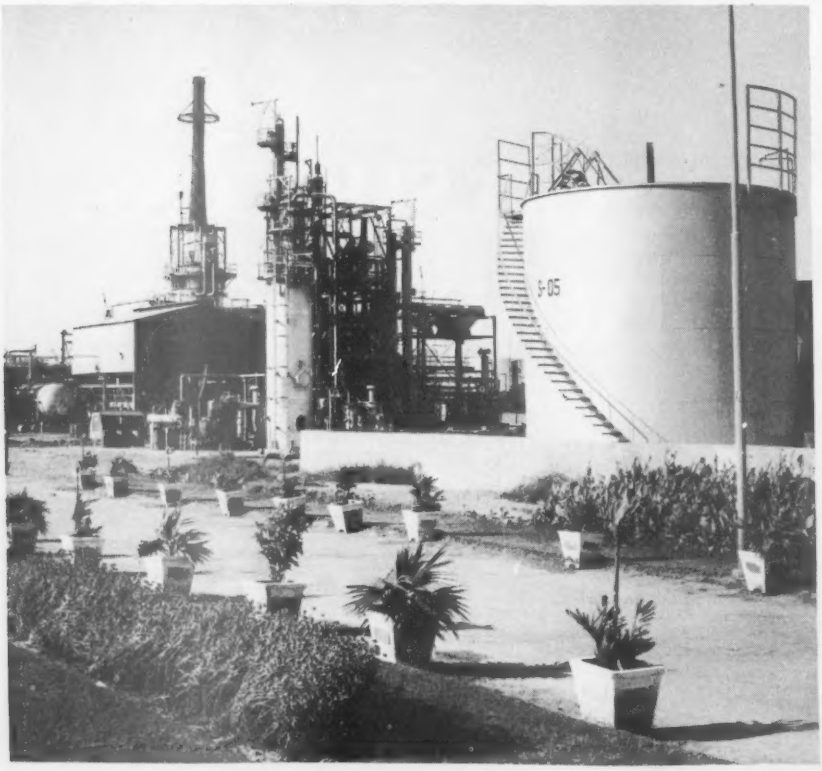
Apart from imports for the railways and the defence services, and certain food imports, all federal government supplies are purchased through the Department of Supplies, headquartered in Karachi. Provincial governments make most of their purchases through similar departments of their own. These purchasing authorities (including the state corporations) send invitations to tender to firms registered with them as agents for manufacturers of commodities that may be required. Such registration is obligatory for the defence services and only exceptionally are sales achieved without the use of a registered agent.

A large number of calls for tender is also advertised in the press, but there is a tendency towards short-dating, and the time allowed only infrequently exceeds one month. For this reason, the practical assistance of an agent on the spot, who may also be effective in learning of the imminence of a tender call, is highly desirable, if not essential.

In the private sector, there is perhaps less need for the services of an agent, since the larger firms prefer to purchase their requirements direct from the manufacturer. However, with the fast-flowing products and with one-off sales, the services of an agent can be very effective in keeping the name of the product to the fore of the market. A number of agents also import on their own account, particularly in the automotive replacement parts and consumer goods field.

Most agents are concentrated in the two main commercial centres of Karachi and Lahore. The more well-established operate

National refinery, Karachi.



UK exports

British exports to Pakistan in 1977 totalled £121 million. Machinery (non-electric) constituted the largest single category with exports at £40.6 million. Transport equipment came next, with £27.4 million, and electrical machinery third, with £10.6 million. The chemical group totalled £16.1 million, the largest individual categories being chemicals (£4.6 million), dyeing, tanning and colouring materials (£4.1 million), medicines and pharmaceuticals (£2.5 million) and plastic materials (£1.6 million). Iron and steel (£6.1 million) and metal manufactures (£3.9 million) also made significant contributions.

Britain's share of the market in July 1976-June 1977 was 8.1 per cent (compared with 7.5 per cent a year earlier), ranking third after the United States (14.7 per cent, but including substantial food aid) and Japan (14.3 per cent). The market shares of other industrialised countries were West Germany (6.4 per cent), Italy (3.2 per cent), China (2.7 per cent), Australia (2.4 per cent) and France (2.2 per cent).

Pakistan's imports of principal commodities

(Million rupees)

Commodities	1973-74	1976-77
Animal and vegetable oils and fats	942	1 652
Chemicals	352	550
Drugs and medicines	184	348
Dyes and colours	165	281
Cutlery and hardware	107	81
Electric machinery, apparatus and appliances	598	1 302
Machinery (excluding electric machinery)	1 106	3 312
Matches	1	—
Grains, pulse and flour	1 555	664
Metal and ores	240	269
Non-metallic mining products	308	339
Mineral oils (including mineral greases)	1 487	4 083
Paper, paste, board and stationery	391	341
Rubber manufactures	90	222
Tea	343	751
Spices	45	83
Sugar	13	—
Textile manufactures	464	801
Transport equipment	1 078	2 016
Wood and timber	59	108
Earthenware glassware	28	60
Other commodities	3 923	5 749
Total	13 479	23 012

Source: Pakistan Statistical Office.

offices in both cities and in the other larger towns. It is preferable to appoint an agent with country-wide representation, but there is no valid reason why one agent should not be based in Karachi and the other in Lahore, and for the territory to be divided between them. There is no legislation governing agency agreements, and although most appear to contain clauses allowing either party to give three months' notice of intended termination, it is preferable for agreements to be made for a set period.

Import controls

Imports into Pakistan are controlled by an annual import policy order, which covers the financial year July to June. This order is split into two parts, the free list and the tied list, with items not included in either being considered banned unless specifically authorised.

The free list comprises three parts: items importable by: A all registered importers; B by industrial consumers concerned only; and C by public sector agencies only. At present, 438 product ranges are covered in the free list, of which 355 come under part A.

The tied list, which has become increasingly shorter over recent years, covers only 22 product ranges, which are importable only from tied sources under tied credit loans and barter deals.

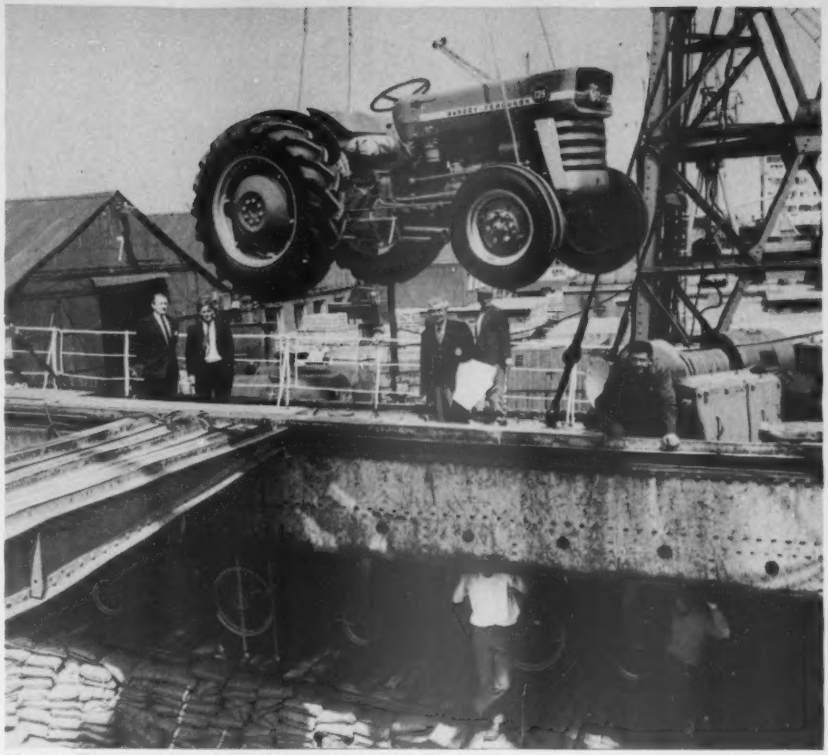
Import licensing is less restrictive than in some developing countries, but licences are required for almost all imports, except direct imports by government departments and agencies. Exporters should therefore confirm that the importer has obtained a valid licence before shipping goods. Shipments should normally be made only against irrevocable letters of credit, and close attention should be paid to the details of documentation. Since all business is conducted in English, exporters should have little difficulty in coping with local documentation requirements, but it should be noted that any discrepancy between documents and goods shipped is likely to lead to cargo being declared frustrated with consequent delays (and, more important, heavy demurrage charges) while the discrepancy is rectified.

Prices should normally be quoted on a C. & F. Karachi basis. Insurance must be effected with companies registered in Pakistan (this includes British subsidiaries) and quotations for up-country sites should not be attempted without the latest advice from local carriers. Exporters should be aware that surface mail can take up to three months to reach Pakistan from the UK so that airmail or telex/cable should be used, particularly when submitting quotations.

Geographical advantage

Pakistan (and the port and major commercial centre of Karachi in particular) is very conveniently situated in relation to other important markets. Its close links with the Middle East, enhanced by the large number of Pakistanis working there, make it an attractive centre for those interested in deals which involve both Arab finance and Pakistani know-how and labour. Karachi is within a maximum of two hours' flying time from any of the Gulf states, and also has frequent and rapid connections to the major commercial centres of India.

The fact that British exports to Pakistan have consistently increased over the last four years indicates that a number of British firms have found it worthwhile to stop off at this crossroads. The comparatively small additional cost of including Karachi in one's itinerary can be repaid many times over.



Massey-Ferguson tractor is loaded for shipment to Pakistan.

Export opportunities

The most promising export potential lies in those areas in which the UK has, for some years, played a prominent part, for example the transport sector. The local content of the Bedford truck has reached approximately 45 per cent, and there is a constant demand for imported replacement parts and spares. This applies also to Ford transit vans (used as mini-buses here), and Ford and Massey-Ferguson agricultural tractors, all of which are assembled in Pakistan. To a lesser extent, other automotive components and replacement parts, which are manufactured in the UK and which can be used on non-British passenger motor cars (mainly Japanese), are also popular.

Non-electrical machinery, which forms the largest proportion of British exports to Pakistan, is another potential growth area, particularly now that imports of used and reconditioned machinery are less restricted. There is also a growing demand for secondary quality steel sheets and steel scrap, and promising markets exist for food processing equipment and vegetable packing and processing machinery, while opportunities are likely to open up for plant and machinery for oil and gas development. The significant demand for industrial chemicals, dyestuffs and tanning materials continues, and any requirements connected with Pakistan's own export industry, cotton textiles, will always be needed.

Export opportunities in Pakistan have grown considerably over the last five years. Like any other market, the most important ingredient for success is a knowledge of the market itself, and this can best be achieved by regular visits and by a good agent. Neither cost a lot in comparative terms and attention to both can pay real dividends.

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Overseas trade exhibitions

Paris fair points to increasing menswear market . . .

From Helen Taylor, British embassy, Paris

There was a 50 per cent increase (to 32 000) in visitors to the September session of the European menswear exhibition (SEHM), held from 9 to 12 September 1978 – over 10 000 of them came from outside France.

This upsurge in attendance can partly be explained by retailers building up stocks from the low levels of last year. But it also arises from the fact that fashionwear for men is now here to stay, and the market is consequently becoming larger.

This was evident from the merchandise displayed by the British companies in the two British Overseas Trade Board's joint ventures at the show – one group co-sponsored by the British Menswear Guild, making its first appearance at the autumn session, and the other by the Clothing Export Council.

Marc Broyer had another very successful show with an up-to-the-minute range of shirts reflecting the season's cut and colours. Derek Rose Pyjamas also did extremely well, especially with leisure shirts and pyjamas in high-quality, lightweight fabrics. Overwhelming interest was shown in the travel accessories of Molmac Group Sales, a newcomer to the fair, with whom firm orders were placed by buyers from 20 countries, impressed by the inventive design, hard-wearing fabric and reasonable prices of the merchandise.

Peter Scott and C. J. Philps, another two new exhibitors, also did good business in their knitwear. The quality goods of Daks-Simpson Ltd, whose impressive stand displayed a range of jackets, trousers, suits, overcoats and accessories, were also much in demand.

Paris can be expected to consolidate its position in the world of men's fashion at the spring session of SEHM, planned to be held from 3 to 6 February 1979, along with the childrenswear and knitwear salons.

. . . and childrenswear breaks new records

From Helen Taylor, British embassy, Paris

Nearly £800,000 worth of orders were taken by British companies on the joint venture at the childrenswear salon held in Paris from 9 to 12 September. Despite the fact that the trade expects this to be the 'lighter' of the annual two sessions, since companies are exhibiting their spring range of garments, 11 established exhibitors in the group (co-sponsored by the National Childrenswear Association and the British Overseas Trade Board) exceeded their previous records for sales.

Outstanding at the show was Paula Lee, which trebled its sales at the session. The company attributes its success to the fact that it designs with Europe very much in mind. This was evident, too, on the Ladybird stand, where its co-ordinated range of garments, in practical designs and eye-catching colours, appealed particularly to the Scandinavian market.

On the other hand, the very feminine look of David Rome's dresses attracted customers from the Middle East, while the exquisitely made garments of Dizzy 'B' Babywear, a newcomer to the joint-venture scheme, were also much in demand. David Charles Childrens Wear and Major Minor Childrens Wear, sharing a joint stand showing girls' and boys' wear respectively, caught the attention of a wide range of buyers.

Most encouraging for exhibitors were indications that they are now becoming recognised as an established feature of the salon, and are building up a regular clientèle among French buyers, including the large departmental stores. The likelihood is, therefore, that the next session to be held from 3 to 6 February 1979 will break yet more records.

British companies prospect for business at ONS '78

From Jon Thomas, British embassy, Oslo

At the opening of ONS '78, the third, biannual offshore North Sea conference and exhibition, Olav Nordli, prime minister of Norway, said that the offshore petroleum industry was not a Norwegian venture. It was a very international activity. He said that Norway was also interested in foreign participation in the context of a wider international co-operation in petroleum and in industrial development. The strong British participation at ONS '78 was evidence of the importance that British industry attaches to the Norwegian market and complemented the view of the prime minister.

Attractively designed

The attractively designed British joint-venture stand, sponsored by the Association of British Oceanic Industries (ABOI) and the British Overseas Trade Board, created great interest. It was well-positioned in one of the main halls and provided an opportunity for the 21 exhibitors to offer their goods and services to the majority of visitors attending the exhibition.

The British stand was the largest (550 m^2) – and certainly received the most press coverage – of the five national stands at the exhibition. The individual stands attracted a continuous flow of visitors, encouraged by the wide variety of technical equipment, models and animate displays, to the delight of those manning the stands.

The range of products offered by the companies covered various specialised sectors of the offshore industry. Most of the firms in the joint venture received interesting inquiries from both Norwegian and overseas visitors, some of which they were confident would eventually lead to business. Two business contracts were actually signed at the exhibition, one of which was worth some £100,000.

All the exhibitors expressed satisfaction with the level and quality of the inquiries they received, and almost all said that because of the high technical standard of ONS and of the achievements obtained, they intended to take part in the next event scheduled for August 1980.

In addition to the joint venture, there were displays of products of 54 other British companies, mostly represented by their agents. Many of these companies had also been present at the two previous ONS exhibitions, and several of them are now well established in the Norwegian market.

Well recognised

The Stavanger exhibition is the only offshore exhibition held in Norway. It has now developed into a well-recognised, international exhibition with particular application for North Sea activities. Some 420 companies from 14 countries were represented.

A technology conference was organised by the Norwegian Petroleum Society, in parallel with the exhibition, at which leading Norwegian and international oil personalities participated.

The conference was divided into four areas of discussion: safety technology for hostile waters; developments within the Norwegian oil scene; Norwegian research and development institutions; and deep water work tasks.

The British offshore industries were officially represented at the exhibition by the Offshore Supplies Office (OSO), Department of Energy, and the Association of British Oceanographic Industries (ABOI).

Sparkling show by British firms at Bijorhca

From Helen Taylor, British embassy, Paris

Professional buyers thronged the two halls at the Porte de Versailles in Paris housing the sixty-sixth Bijorhca, from its opening on 7 September to the closing minutes on 12 September. The draw of this exhibiton is that it contains a unique combination of products, jewellery, precious and semi-precious stones, silverware, clocks and giftware, on the stands of over 1000 exhibitors.

Forty-five British manufacturers were represented at the show, 20 forming a joint venture sponsored by the British Jewellery and Giftware Federation and the British Overseas Trade Board.

Busy exhibition

It was a busy exhibition for all of them, and newcomers, in particular, obtained encouraging results. Cannon Novelties made its début

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Boost for textiles and toys

While Britain's textile products are held in high regard in Japan, the UK is battling successfully to increase its share of a diminishing imported-toy market. John MacDonald, of the British embassy in Tokyo, reports on two exhibitions which boosted Britain's reputation in these two fields.

Textiles at BEMC

Britain is noted in Japan for its woollen and worsted fabrics, imports of which in 1977 totalled £23 million at fob prices. The Japanese appreciate high-quality as is indicated by the fact that, although Japan was in 1977 the largest export market in this sector in terms of value, it was only third after West Germany and the United States by volume. The British success in this market has mainly been due to the very high regard given by the Japanese to high-quality British men's suiting.

When it comes to ladieswear fabrics, the Italians and the French dominate the imported-product market in Japan, and the British share last year was only £1.7 million. This seems strange, in view of the fact that British manufacturers supply ladieswear fabrics to leading European couturiers.

With this in mind, and in an effort to expand their share of the market, 18 companies took part in the British textiles fair held from 5 to 9 September. It was jointly organised by the National Wool Textiles Export Corporation (NWTEC) and the British Overseas Trade Board.

The exhibitors were in the main already established in the market, but among them were four who were seeking representation. With wool fabrics for ladies taking the leading role, a wide range of textiles were on display – linen, cotton, silk and synthetic fabrics for ladies; hand-knitting yarns; woollen garments and wool accessories, including travel rugs, shawls, and mufflers; bedspreads and curtaining material.

The guest of honour at the packed opening reception, was Tsuruzo Yagi, president of the Japan Textiles Importers' Association. Other leading figures from the fabrics wholesalers' associations in Tokyo and Kyoto, together with representatives from IWS Japan, all of whom had been most helpful in distributing advance details of the exhibition to their members, were also present.

The companies taking part in the exhibition came from many different regions of the UK and this was appreciated by the 1000-plus trade visitors, who were able to see a representative cross-section of designs and fabrics reflecting their regional origin.

Roy Mason, Secretary of State for Northern Ireland, in Japan to encourage Japanese industrial investment in Northern Ireland, visited the show and was warmly welcomed by all the participants, particularly by the Moygashel and Castle Island Spinning and Weaving companies who manufacture in the province.

Mr J. England, managing director of Jonathan Thorp/Glyntaf Fabrics Ltd, was delighted with the outcome of the show. His company had appointed its local representative only a few weeks earlier, and participation at the exhibition had provided an ideal opportunity for his agent to introduce his customers to the product ranges on display. Michael Wade of Celtic Weavers, exhibiting a new range of top quality Welsh wool bedspreads and ladies' fabrics, was pleased with his first visit to Japan. He found the exhibition particularly useful in identifying a number of good contacts with whom to pursue negotiations. Similar comments were made by other exhibitors, all of whom had received an encouragingly high level of interest in their products.

Despite their success at the exhibition, the companies were not complacent. There was general consensus that repeat visits to Japan would be necessary, and that the exhibition was merely the start of a sustained campaign. Although it is still early days, the NWTEC and its members are thinking about repeating the shows over the next few years.

Japanese international toy fair

According to information from the Japan International Toy Fair Association, Japan, with production of toys in 1977 valued at £1 billion, ranked second only to the United States. Domestic production met most of the market demand, with imported products occupying a tiny 3.2 per cent.

Against the trend of falling imports (down from 4 per cent of the total market in 1976), British toy exports to Japan increased in value terms by almost 15 per cent in 1977, and at £2 million at cif prices, although behind the United States (£2.7 million), were ahead of our European competitors. In the words of Tom Cassidy, chairman of the BHTMA (British Toy and Hobby Manufacturers' Association) 'Our efforts to promote British toys in Japan are meeting with success'.

It was therefore with a certain amount of anticipation that 12 British companies took part in the second international toy fair, 5 to 7 September, on a joint-venture stand organised by the BTHMA and the British Overseas Trade Board.

They showed a varied range of products, from the baby toys displayed by Paul and Marjorie Abbatt Toys, Dean's Childsplay Toys, Tebro Toys, Alresford Crafts, and Newfeld; through the diecast miniature scale models (a traditional feature of the British toy export drive in Japan) from Mettoy Playcraft, and sturdy rocking horses from Pegasus Toys and Haddon Rockers; to a $\frac{1}{12}$-scale replica of Stephenson's 'Rocket' on the Rovex International booth, and darts and sports equipment by M. Y. Dart. Mr Cassidy's own company, Cassidy Brothers, displayed battery-operated girls' and boys' mechanical toys, and Invicta Plastics (who have recently set up their own marketing office in Japan) showed their 'Master Mind' range of games.

During the three-day event, over 15 000 trade visitors attended, drawn from importers, wholesalers and retailers. Orders are rarely taken at trade shows in Japan, but the British contingent anticipate £347,000-worth of business from the exhibition. A number of agency arrangements were also concluded. The event was also valuable in cementing relations between BTHMA and the Japan Toys Association whose chairman, Yoshihiro Kishi, made a special point of visiting the British stand and greeting each exhibitor personally.

Business being discussed on M. Y. Dart's stand at the Japanese international toy fair.

on the exhibition circuit and was delighted with the orders placed by French buyers for its decorative mirrors. Hatton Chain was also surprised at the reception given by the French market to its products. Corrocraft Ltd, which has recently set up an operation in France, reported a 300 per cent increase in business at this session.

An elegant display of tableware, laid out on the grouped stands of the six British manufacturers in the joint venture sharing a common agent (Cavalier Tableware, Crown Staffordshire, Midwinter, Port Meirion Potteries, Royal Doulton Tableware and William Adams), brought compliments from visitors and resulted in improved business for them all.

Clover Leaf Giftware also reported an increase in the number of foreign visitors placing orders for its dainty place mats and trays, while in the silverware section, P. H. Vogel and Co Ltd also expected its figures to be up.

The organisers of Bijorhca make no secret of the fact that they exercise strict control over both exhibitors and buyers to maintain the prestige of the show. The British companies exhibiting at this latest session have reaped the rewards in concrete terms.

Exhibitions continued on page 726

'T & I' index inquiries

Readers wanting to know when articles and items of information were published in *Trade and Industry* should consult the published indexes which are issued free to subscribers. For material published in recent months, inquiries of this kind can be made to the Department of Industry Library's indexing section, tel. 01-215 5842 or 01-215 5879.

Caution exhibited at two Swiss fairs

From John Gysin, British consulate-general, Zurich

Two international exhibitions involving joint ventures sponsored by the British Overseas Trade Board took place concurrently in Basle and Zurich. Both Ilmac (12 to 16 September) and Semicon (12 to 14 September), though catering for different sectors of electronics, involved instrumentation and automation.

Ilmac in Basle was the seventh international chemical engineering, measurement and automation exhibition and congress, held for the first time in conjunction with the surface treatment exhibition. Over 21 000 visitors came to the event, where 365 exhibitors were at Ilmac and 112 at the surface treatment show. Eight British companies exhibited prominently on the ground floor under the auspices of the British Laboratory Ware Association.

While some companies were initially disappointed by the low number of visitors, most had by the end of the exhibition received a satisfactory number of serious inquiries. Quality of inquiry rather than quantity seemed to be the watchword and at least one exhibitor thought that his participation would pay for itself many times over.

The importance of Ilmac, because of Basle's situation on the borders of France and Germany, coupled to the proximity of the large Basle-based chemical/pharmaceutical multinational companies, cannot be overlooked.

Exhibitors took the opportunity to discuss export business with agents from all over Europe and both potential and existing customers. Particularly those companies who had prepared themselves and sent out pre-exhibition invitations reaped the reward. Ilmac/Surface will be held next in September 1981.

Semicon

Semicon Europa, the exhibition and congress covering specifically systems, machinery and equipment used by the semiconductor industry, was held for the third successive year in the main Zurich exhibition hall.

A compact exhibition covering two floors of the main building, Semicon drew over 2000 delegates to the congress, where some 115 companies exhibited.

Ten British companies exhibited under the umbrella of the Electronic Engineering Association. They showed a range of high technology equipment for this key industry, where a corner stone of the future foundations of the UK's Industrial Strategy lies.

Although no sensational orders were reported, the British participants took a steady stream of inquiries which are confidently expected by most to indicate satisfactory export business over the next 18 months in this sector. The next Semicon Europa will switch to a spring date in March 1980.

Both Semicon and Ilmac showed a cautious trend by discerning visitors and it is apparent that competition is now fiercer than ever.

Clearly there are now many British companies who, without the aid of BOTB joint ventures, would not be able to exhibit, and, equally clearly, those who realise the importance of the pre-exhibition preparatory work, where appropriate with the assistance of the local agent or distributor, reap the most benefit.

British firms wide awake at anaesthetics congress

From Helen Taylor, British embassy, Paris

Over 2400 members of the medical profession, from all over the world, attended the fifth European congress of anaesthesiology, organised by La Société Française d'Anaesthésiologie, d'Analgesie et de Réanimation, and held at the Palais des Congrès in Paris from 4 to 9 September.

The scientific and technical exhibition mounted in conjunction with the congress provided companies taking part with an opportunity to profit from this gathering by renewing contracts with old clients, obtaining new customers and discussing with them the current needs of the profession.

Leading producers of anaesthetic equipment and pharmaceutical products were present, ranging from household names such as ICI (represented by their French subsidiary ICI Pharma) to small, specialist companies whose reputation is confined more to medical circles.

Seventeen specialist companies were included in the joint venture, sponsored by the British Health Care Export Council and the British Overseas Trade Board. One such company, Blease Medical Equipment, scored a particular success with its Brompton ventilator by obtaining an order worth approximately £30,000 from an Arab country. Portex, another member of the joint venture, launched two new products into the European market: its streamlined Profile endotracheal tube and Vistacan, a new design of instrument for use in the course of intravenous therapy. Sherwood Medical Industries reported good business for its syringes, needles, tubes and catheters, and Scotts Electrical was also pleased by visitors to its stand: visitors from Japan and the USSR, showed interest in their decontaminators and disinfectors.

European congresses of anaesthesiology are held once every four years, with the next one due to take place in London, at the new Barbican centre in 1982. In 1980, a world congress will be held in Hamburg.

UK lingerie trade uplifted by German market

From H. C. von Massenbach, British consulate-general, Düsseldorf

A record total of 372 exhibitors showed their products at Igedo-Dessous (Düsseldorf, 11 to 14 September) probably now the most important European fair for the lingerie and foundation garment industry and trade.

The international character of the Igedo-Dessous was underlined by the participation of 188 foreign exhibitors from 17 countries. Great Britain with 30 firms, after France (42 firms), had the largest foreign representation.

The particularly strong presence of trade buyers from Austria, Switzerland, Italy, France and the Benelux countries opened up many new trading opportunities for the British exhibitors.

Most significant was the increased interest shown by the German trade in British goods. Many of the representatives from the German store groups, mail order houses and many more from the specialist retail trade placed business with the 30 British exhibitors taking part under the British Overseas Trade Board's joint-venture scheme in co-operation with the Clothing Export Council.

The positive trend in the development of German sales indicates the competitiveness of British producers and the potential that this market offers.

Igedo-Dessous, until now an annual event held in September, will in future also take place in March. The sixth Igedo-Dessous is scheduled to take place from 11 to 14 March 1979.

ECGD cover for overseas fairs

As a supplement to the ordinary insurance policy exporters have with Export Credits Guarantee Department (ECGD), cover is available for goods exhibited at fairs overseas against the rather special risks involved.

The standard cover includes sales at overseas fairs

Sales made at overseas fairs are covered under the standard ECGD policy against eventualities of loss, such as the insolvency of the buyer or his default, or exchange difficulties preventing transfer of payment from the buyer's country.

Special cover

Under a special policy supplementary to an exporter's main policy, ECGD can cover also the risks of loss arising while the goods are being exhibited or are on their way to be exhibited.

The risks covered are loss caused by destruction or damage resulting from war (including 'civil war, hostilities, rebellion and insurrection') occuring in the country where the goods are being exhibited or in a country through which the goods are travelling on their way to be exhibited,
or war between any of the countries involved,
or the requisition or confiscation of the goods in these countries,
or any measure or decision in the country where the goods are exhibited which prevents their re-export to the UK.

For more information about this special cover, get in touch with the nearest regional office of ECGD.

ECGD's head office is at Aldermanbury House, Aldermanbury, London EC2. There are regional offices in:

Central London 01-437 2292 **North London** 01-808 4570 **South London** 01-686 9921 **Belfast** Belfast 31743 **Birmingham** 021-233 1771 **Bristol** Bristol 299971 **Cambridge** Cambridge 68801 **Glasgow** 041-332 8707 **Leeds** Leeds 450631 **Manchester** 061-228 3621.

Overseas trade export services

First ship for new Northfleet Hope Container terminal

Britain's newest container ship facility, a £24 million complex designed to handle over 75 per cent of Britain's total liner trade with Australia and New Zealand, received its first ship on 15 September when Overseas Containers' *Encounter Bay* berthed at Tilbury, Northfleet Hope Container Terminal.

The terminal is a major British port development and the largest single engineering project in the Port of London since the construction of Tilbury docks extension 10 years ago.

The development is a joint investment by two of the port's major customers, Overseas Containers and Associated Container Transportation (Australia) Ltd (ACT(A)), and the Port of London Authority.

The terminal will be operated by Tilbury Container Services (TCS), the operating company formed by OCL/ACT(A), which has equipped the terminal with modern mobile plant, quayside container cranes, refrigeration installations and other specialised facilities. They will run it as a self-contained terminal leased from PLA who are labour contractors to TCS for terminal operations. The terminal will operate on a three-shift, round-the-clock basis.

Annual throughput will be about 170 000 trailer equivalent units, the equivalent in tonnage terms of 15 to 20 conventional general cargo berths says PLA.

Northfleet Hope Container Terminal is a technically interesting development project which involved the re-modelling of an existing and operating container terminal within Tilbury docks, and the reclamation of some 25 acres from the river.

The new terminal spans 64 acres providing a new 1 000 ft. deepwater riverside berth capable of taking the largest container ships in the service and accommodation for 1464 refrigerated containers – the biggest such facility in the world.

Further information: circle 178

Freightliner's new container deal to Germany

Freightliner, the world's largest overland container haulier, is offering rate reductions of up to 20 per cent on through container movements between the UK and West Germany as a result of new agreements reached between Intercontainer, the European railway container transportation company, and the European rail companies.

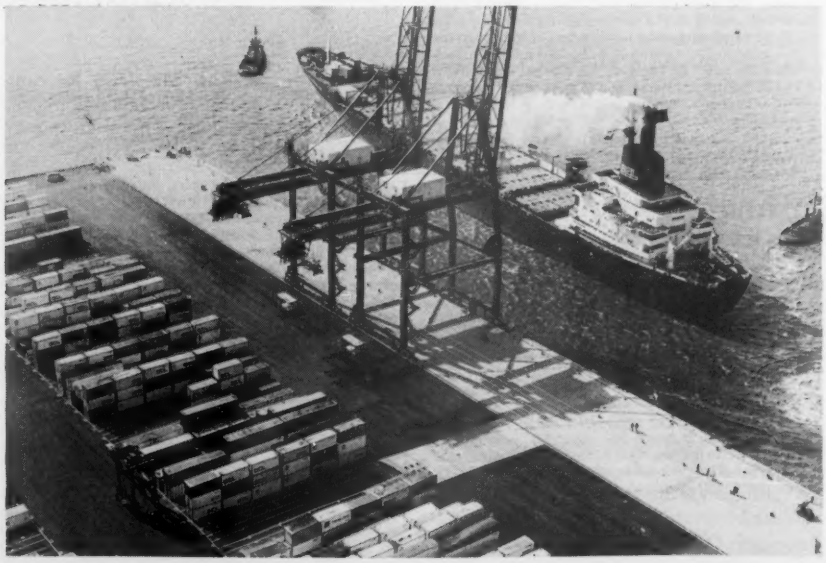
To stimulate container traffic between the UK and West Germany, Freightliner as a UK representative for Intercontainer is now selling to the container operators and forwarding companies the reduced rate services between Freightliner terminals and 11 major centres in West Germany through both Zeebrugge and Rotterdam.

Terminals included in the deal include Frankfurt, Duisburg, Mannheim, Bremen, Bochum, Hanover, Karlsruhe, Ludwigsburg, Hamburg, Munich and Nurnburg.

Both Freightliner and the German railways will provide a road service from the rail terminals to give a door-to-door operation.

Further information: circle 179

OCL's *Encounter Bay* berths at Northfleet Hope, Tilbury, to inaugurate the new £24 million riverside container berth.



New UK- W. Germany link

European Freightbus has been appointed the new London and south-east England agent by West Friesland Int. Spedition of Stuttgart.

West Friesland is one of the leading West German groupage agencies, as is European Freightbus in the UK, and both parties feel that, with the joining together of these two companies, it will be beneficial for all concerned.

European Freightbus sends driver-accompanied groupage trailers from London depot every Tuesday, arriving Stuttgart on Thursday for re-loading back to the UK, and, again departing on Fridays in London to arrive Stuttgart on Tuesdays for re-loading.

European Freightbus intends to increase its Stuttgart departures from twice per week to three times per week in the next few months.

Further information: circle 180

Container groupage services to Libya

Cave Wood (Transport) Ltd, representing the ro-ro and container services of Messina Lines of Genoa, is now offering weekly groupage departures to both Tripoli and Benghazi in addition to its full-load container and trailer services.

Groupage is consolidated at Cave Wood's depots in High Wycombe, the midlands and the north, from where through rates to arrival Tripoli or Benghazi are offered. Containers are stuffed directly in the UK and unloading at destination is carried out in the port terminal warehouse.

Further information: circle 181

Tor Line uprates UK-Denmark service

Tor Line has added a fourth weekly sailing to its Felixstowe-to-Gothenburg service schedule.

Starting on 4 October, the line will add Thursday sailings to the present scheduled departures on Mondays, Fridays and Sundays. The passenger/freight ferries *Tor Britannia* and *Tor Scandinavia* will provide this uprated service.

The 24.5-knot ferries, each with capacity for up to 780 linear metres of freight, have provided the mainstay of Tor Line's Felixstowe-to-Gothenburg service since spring 1976, when *Tor Scandinavia* joined *Tor Britannia* on the route.

Further information: circle 182

Overseas trade country data

Australia

Umbrellas and sunshades, etc. A notice in *Trade and Industry*, 13 January, reported that the Australian government had asked the Industries Assistance Commission to inquire into and report on the long-term assistance needs of the umbrella industry.

The commission has now issued a draft of its report to give interested parties an opportunity to examine and comment on it before final recommendations are submitted to the government.

In order to receive submissions on the draft the commission will hold a further public hearing beginning at 10 am on Monday, 23 October, in the Public Inquiry Room, Industries Assistance Commission, 16th Floor, 59 Goulburn Street, Sydney NSW. Those intending to make a submission should inform the commission as soon as possible of their intention to do so.

A copy of the draft report is obtainable on loan from Department of Trade, 1 Victoria Street, London SW1H 0ET.

Inquiries: CRE 01-215 5319.

Ref: CRE 864/77.

Confectionery and chocolate products. A notice in *Trade and Industry*, 21 October 1977, reported that the Australian government had requested the Industries Assistance Commission to inquire into and report on the question whether assistance should be accorded that sector of industry producing confectionery, chocolate and cocoa products.

The commission has now issued a draft of its report to give interested parties an opportunity to examine it before final recommendations are submitted to the government.

In order to receive submissions on the draft the commission will hold a further public hearing beginning at 10 am on Wednesday, 1 November 1978, in the Public Inquiry Room, Industries Assistance Commission, 16th Floor, 59 Goulburn Street, Sydney NSW. Those intending to make a submission should inform the commission as soon as possible of their intention to do so.

A copy of the draft report is obtainable on loan from Department of Trade, 1 Victoria Street, London SW1H 0ET.

Inquiries: CRE 01-215 5319.

Ref: CRE 392/77.

Belgium

Silverplated goods. According to information received from the British embassy in Brussels, some foreign manufacturers of silverplated articles have experienced problems recently, because the Belgian authorities are now applying the existing law on hallmarking very stringently. This means that all silverplated articles sold on the Belgian market must carry two hallmarks:

1 The hallmark of the manufacturer or of the importer, whichever hallmark has been legally deposited at the Hotel des Monnaies. This distinct mark is to be stamped within a barrel-shaped stamp of specific design.
2 The weight in grammes of pure silver applied on each object or on each dozen where cutlery is concerned. The figure must be stamped within a rectangular stamp.

Copies of the law (in French) are available from OTAR 01-248 5757 ext. 288/466/467.

Brazil

Reference prices. Customs Policy Council resolutions 3213, 3229, 3238, 3226, 3227 and 3237, published in the *Diario Oficial* of 18 July and 21 August, established reference prices for the following goods:

29.15.01.99 Phthalic plasticisers; 82.02.02.00 Metal saws mounted; metal saw-frames without blades; 82.05.03.00 Concrete drills, with hard metal tip; 82.05.06.00 and 82.05.07.99 Spiral or helicoidal drills of a diameter up to 52 mm and other drills; 82.07.99.00 Hard metal tool-tips for use with drills and any other tool-tip of hard metal; 84.41.04.00 Sewing machines for industrial use; 84.62.90.91 Calibrated steel balls; 84.62.90.05 Internal or external rings for ball-races, normal or special manufacture, turned or forged, with or without heat treatment and with or without finishing operations.

Inquiries: OTAR 01-248 5757 ext. 476/474.

Burundi

Import regulations. The Banque de la Republique du Burundi has issued the following new import regulations which came into force on 1 July.

1 All goods imported to Burundi must be insured with the approved Burundi insurer (SOCABU) and paid in Burundi francs.
2 All consignments of goods exceeding 500,000 Burundi francs are subject to pre-shipment inspection on quality, quantity, packing and price comparison, by the General Superintendence Co (UK) Ltd, Orchard Lea, Winkfield, Nr Windsor, Berkshire.

Inquiries: OTAR 01-248 5757 ext. 472.

Federal Republic of Germany

Poultry. The *Bundesgesetzblatt*, 43, 2 August, published 'An order to change the "Poultry Inspection Order" and "The Changes Order – Poultrymeat Hygiene" ', dated 27 July. The order came into force on the day after publication.

Copies, in German, are available from OTAR 01-248 5757 ext. 467/466/288.

Animal foodstuffs. The *Bundesgesetzblatt*, 50, 19 August, published an 'Order on the import and through transport of animal foodstuffs of animal origin'. This order will come into force on 1 April 1979.

Copies, in German, are available from OTAR 01-248 5757 ext. 467/466/288.

Ghana

Pre-shipment inspection. The Bank of Ghana has announced that books, periodicals and journals destined for the universities of Ghana, Cape Coast and Kumasi will no longer be subject to pre-shipment inspection.

Inquiries: CRE 01-215 3064.

Indonesia

Borax for fertilisers. The Indonesian government has announced, retroactive from 1 October 1977, an exemption from import duty and sales tax on borax (tariff heading 28.46.00) used in fertilisers.

The import duty is nil and the sales tax nil when the import of borax required for estates is supported by a recommendation from the Department of Agriculture.

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

Irish Republic

Import authorisation. The Irish Revenue Commissioners' notice 1498 reminds importers that certain products require an import authorisation. The products are:

1 Certain live plants or floricultural products originating in Hungary, South Africa, Israel, Spain, Kenya, Colombia and Romania (regulation (EEC) 3353/75)
2 Certain processed fruit and vegetable products originating in certain state-trading countries (regulation (EEC) 2123/75)
3 Certain phosphate fertilisers originating in all non-EEC countries (regulation (EEC) 440/77 (as amended))
4 Sisal binder and baler twine originating in all non-EEC countries (SI 111 of 1975)
5 Certain clothing, textile goods and footwear originating in all countries (SI 116 of 1975, SI 61 of 1976 and SI 155 of 1978)
6 Certain iron and steel (ECSC) products originating in all non-EEC countries (recommendation 77/330/ECSC (as amended))
7 Slide (zip) fasteners originating in all non-EEC countries (regulation (EEC) 646/75 (as amended))
8 Motor car tyres originating in the German Democratic Republic and in free circulation in other member states of the EEC (SI 111 of 1978)

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Exports (CRE) Division, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU (tel: 01-248 5757). In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

New Zealand

Vehicle parts. The New Zealand government has issued the Customs Tariff (Vehicle Parts) Amendment Order 1978 which came into force on 1 July where the rates of import duty for certain vehicle parts, from the UK and Australia, are amended to read as follows:

Tariff no./Description	Rates of duty and exemptions from duty	
84.06.071		
Vehicle engine parts	Aul.	Free
	UK	Free
84.10.021		
Pumps	Aul.	Free
	UK	Free
84.63.001		
Crankshafts and camshafts for internal combustion engines	Aul.	Free
	UK	Free
Electrical starting and ignition equipment		
85.08.001		
Ignition coils, sparking plugs	Aul.	20%
	UK	20%
85.08.011		
Distributors	UK	5%
85.08.021		
Generators	UK	Free
85.08.031		
Other	Aul.	Free
	UK	5%
85.08.039		
Parts	Aul.	Free
	UK	Free
Lighting and signalling equipment		
85.09.011		
Other	Aul.	20%
85.09.019		
Other kinds	Aul.	Free
	UK	Free
Parts and accessories of motor vehicles		
87.06.011		
Heaters	Aul.	20%
	UK	20%
87.06.021		
Mufflers	Aul.	20%
	UK	20%
87.06.031		
Radiators	Aul.	20%
	UK	20%
87.06.041		
Mainly of unhardened vulcanised rubber or artificial plastic materials	Aul.	20%
	UK	20%
87.06.059		
Other	Aul.	20%
	UK	20%

Inquiries: OTAR 01-248-5757 ext. 401/468/469.

South Africa

Customs tariff changes. The following amendments were published in the South African *Government Gazette* of 1 September 1978:

R.1761: CCCN 84.45 and 84.48: Specific provision is made for centre lathes with a centre height above the bed exceeding 280 mm but not exceeding 325 mm, not numerically controlled, and the rate of duty thereon is increased from free to 30% or 400c per kg less 70%. The rate of duty on parts for these lathes is increased from free to 20%.

Industrial rebates

R.1752: item 311.12. CCCN 51.04: 1 The provision for a rebate of duty on open weave fabrics of cellulosic fibres (continuous) with a construction not exceeding 10 threads per cm^2, is extended to cover all open weave fabrics of man made fibres with a construction not exceeding 10 threads per cm^2. 2 The provision in so far as it relates to open weave fabrics of polyamide or polyester fibres, with a construction not exceeding 10 threads per cm^2 is made with retrospective effect to 5 May 1978.

R.1753: item 316.01. CCCN 84.06 AND 84.63: Provision is made, with retrospective effect to 30 April 1976, for a rebate of the full duty less 3% on compression ignition engines, gear boxes and parts thereof, driving axles and torque converters, for the manufacture of self-propelled cranes.

R.1763: item 316.01. CCCN 84.48: The provision for a rebate of duty on tailstock assemblies and beds for the manufacture of certain centre lathes is withdrawn whilst provision is made for a rebate of the full duty on headstock assemblies for the manufacture of centre lathes with a centre height above the bed exceeding 280 mm but not exceeding 325 mm.

General rebates

R.1754: item 402.02: Tariff heading 73.21 is deleted. The provision for a rebate of duty on equipment, including sluice gates ,weir flaps and other steel structures, for use by any local authority for the construction of water supply barrages, is withdrawn.

R.1755: item 460.16: Tariff heading 84.59 is deleted. The provision for a rebate of duty on forgings for the manufacture of hydraulic agglomerating presses with a capacity of 5000t or more, is withdrawn.

Rebates and refunds of excise duty

R.1756: item 607.04.15: The provision for a rebate of duty on wine spirits or grape spirits for the cleaning of such containers as the Secretary may allow is extended to also include the sterilillisation of such containers as well as the cleaning and sterilisation of bottling apparatus.

Import surcharge

R.1762: surcharge item: 176.00. CCCN 84.00: Addition to the list of exclusions – CCCN 84.45.10.40.

Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

Customs tariff changes. The following amendments were published in the South African *Government Gazette*, 8 September:

R.1792, CCCN 25.19: Subheading 25.19.30 is restated.

R.1793, CCCN 39.01: The rate of duty on polyethylene terephthalates in blocks, lumps, powders, granules, flakes and similar bulk forms is increased from 5 per cent to 20 per cent.

R.1794, CCCN 49.08: The rate of duty on transfers (decalcomanias) is amended from 20 per cent or 1,100c per 100 kg to 20 per cent or 500c per kg less 80 per cent.

R.1795, CCCN 85.01: Specific provision, at a rate of duty of 20 per cent (general) and 15 per cent (preferential) is made for electric alternating current generators, rated at more than 25 kV.a but not exceeding 450 kV.a.

R.1796, CCCN 85.20: Subheading 85.20.30 is restated and specific provision is made for mercury vapour lamps (including those fitted with incandescent filaments) at the amended rates of duty.

R.1797, Item 167.00. CCCN 39.00: Addition to the lists of exclusions 39.01.61.20.

Industrial rebates

R.1798, Items 311.04, 311.06 and 313.07. CCCN 49.08: (1) The provisions for a rebate of duty on transfers (decalcomanias), for use in the textile knitting industry and for the printing of woven fabrics are withdrawn. (2) The translation in the Afrikaans text of items 313.06/49.08 and 313.07/49.08 is rectified.

R.1799, Items 311.12 and 320.02. CCCN 51.04: Provisions are, with retrospective effect to 5 May 1978, made for a rebate of duty on certain woven fabrics of man-made fibres (continuous) for the manufacture of impregnated or coated fabrics, including paper fabrics, and padded, stuffed or fitted furnishings (excluding mattresses and mattress supports).

General rebates

R.1800, Item 404.03: Provision is made for a rebate of duty on goods of any description for use by the Human Sciences Research Council.

Drawbacks and refunds of customs duty

R.1801, Item 520.02. CCCN 49.08: Item is restated and the extent of drawback is full duty.

Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

Tariff application. Customs tariff application list 31/78, published in the South African *Government Gazette*, 22 September, contains applications to the Board of Trade and Industries for increase in duty on:

1 Lithographic plates of aluminium classifiable under tariff subheadings 37.01.90 and 84.34.30 and offset duplicating masters of aluminium classifiable under tariff subheadings 37.01.30 and 84.34.90.

2 Certain air conditioning machines classifiable under tariff heading 84.12.

3 Household refrigerators classifiable under tariff heading 84.15.

Those British trade organisations thought to be interested in the applications are being informed. Any British firm affected which wishes to make representations to the South African Board of Trade and Industries and belongs to a trade organisation should, therefore, first contact its own trade association.

If any firm proposes to make independent representations to the South African authorities and requires further information concerning the application, it should address inquiries to CRE 01-215 5274.

Spain

Acid engraving machines. The Spanish *State Gazette*, 15 September, published royal decree 2162/1978 of the Ministry of Commerce, modifying 84.34b as follows:

CCCN 84.34b	Import duty (unchanged)	Compensation tax (unchanged)
Acid-engraving machine using a continuous acid feed, an electronic process, photopolymers or laser	5%	9%

This decree came into force on 15 September and is effective from then onwards.

Inquiries: OTAR 01-248 5757 ext. 461/458/459/460.

Tanzania

Unitisation of cargo. The Tanzanian Harbours Authority has announced guidelines for the unitisation of cargo for Tanzanian ports. These guidelines lay down modes of unitisation for certain types of cargo and give specifications for palletisation, skidding etc.

Where it is uncertain that a method of presentation will count as unitised, inquiries should be made to the Director of Operations at the headquarters of the Tanzanian Harbour Authority.

Berthing and working priority will be given to vessels carrying unitised cargo. First priority will be given to vessels carrying more unitised cargo than the rest, but no vessel will be considered for this treatment if the amount of unitised cargo is less than 50 per cent of the total cargo it has to load or discharge at any of the authority's ports.

Inquiries: CRE 01-215 5226.

Uruguay

Concessions for agricultural machinery etc. The Uruguay government in its effort to improve the economy of the country, has issued some decrees which are intended to foster the development of the agricultural sector.

Copies in Spanish of the three decrees which establish specifically the reduction of import duties on tractors, whether in kits or assembled, spare parts for agricultural machinery and fertilisers, are available from OTAR 01-248 5757 ext. 474/476.

Concessions for seeds. Resolution 979/978 of 28 June extends the exemption from duties, surcharge and prior deposits until 31 December on seeds.

A copy of the resolution is available in Spanish from OTAR 01-248 5757 ext. 474/476.

Zaire

Customs tariff amendments. The government of the Republic of Zaire has published amendments to the following tariff chapters with effect from 11 July 1978:

04, 07, 16, 22, 25, 27, 29, 32, 36, 37, 39, 40, 42, 44, 48, 49, 51-55, 60, 63, 64, 65, 73, 82, 83, 84, 85, 87, 90, 91, 92, 97, 98.

Inquiries: OTAR 01-248 5757 ext. 473.

European community news

US attitude could unleash trade war – Haferkamp

EEC ministers meeting in Brussels on 19 September agreed that work should press ahead on the Multilateral Trade Negotiations (MTNs), with a view to agreement in a balanced package by mid-December.

Vice-president Haferkamp, however, told foreign affairs and trade ministers that the United States' special trade negotiator Robert Strauss had written in July warning him that prospects for congress agreeing to an extension of its waiver on contervailing duties beyond the current expiry date of 3 January 1979 were not good.

The cause of the problem is the United States 1975 Trade Act, which makes possible the imposition of countervailing duties on any subsidised export to the United States. Under a special section, however, the United States' President can waive application of this provision. But this power expires on 3 January 1979.

The council endorsed Mr Haferkamp's strongly worded reply to Mr Strauss which stressed that the imposition of countervailing duties on EEC exports without an injury test as required under the General Agreement on Tariffs and Trade would inflict 'grave damage on exporters' and would lead to strong pressures for retaliation.

Since not only community exports would be affected, the letter points out, this could 'unleash a trade war of considerable dimensions'. Mr Haferkamp indicated that it would be unrealistic to expect member states to conclude negotiations when there was the possibility of a 'trade war'.

Speaking after the council, trade secretary Edmund Dell said he and his EEC colleagues were in full agreement that it was up to the Americans to remove 'this totally unnecessary impediment to progress' in the MTNs.

The threat of countervailing duties, said Mr Dell, would not only make it difficult for the EEC to sign an agreement in Geneva at the end of the year but was 'a weight hanging over the whole negotiations between now and December 15'.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

Home news
Safety regulations for cosmetics next month 705
Government ready to look at revised 'Channel' proposals 706

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Statistics
Foreign arrivals in UK in June 736

Ministers extend steel fines system

Terms of a commission decision on taking deposits for fines for breaches of ECSC minimum prices for certain steel products were agreed in principle by foreign affairs ministers at their council in Brussels on 19 September.

This decision renews that approved in June and extends the system, which is amended only in minor respects, to the end of November.

Following a discussion about external trade in steel, it was agreed that the community should agree the terms of a draft OECD resolution establishing a steel committee, subject to the satisfactory conclusion of negotiations in the OECD ad hoc group. However, the community would not be able to agree to the draft resolution being placed before the OECD council until the problem of United States' anti-dumping action in parellel with the use of the trigger price mechanism had been resolved.

Finance ministers discuss monetary system

EEC finance ministers meeting in Brussels on 18 September continued their discussions of 24 July on the European monetary system (see *Trade and Industry* 4 August page 262) on the basis of interim reports from both the monetary committee and the committee of central bank governors.

Ministers held a highly constructive discussion on all questions bearing on the implementation of the European monetary system (EMS) in accordance with the conclusions reached by the European council meeting in Bremen on 6 and 7 July.

The council asked both committees to finalise their discussions in the light of its discussions and to submit final reports at the October council.

The council was also presented with the economic policy committee's interim report on its proceedings, following instructions issued at the 24 July council and the European council's call for the parallel study of measures needed under the EMS to strengthen the economies of the less prosperous member states. Such measures will be crucial to the success of the monetary stability zone.

The council asked the economic policy committee to continue its discussions in the light of the council meeting and to report back to it by November.

The council also recorded its agreement on the statement to be made by the presidency at the annual meeting of the International Monetary Fund (IMF).

During the council, there was a second meeting of the conciliation committee with the European parliament on the proposal for a decision authorising the commission to contract loans to promote investment in the community. Each of the two institutions agreed that it would consider what further action to take on this proposal in the light of today's exchange of views.

Still barriers to EEC-Asean trade says Indonesian minister

Asean (the Association of south-east Asian nations) sees itself as an increasingly important business partner in coming years, Radius Prawiro, Indonesia's Minister of Trade and Co-operatives, told an EEC-Asean trade promotion seminar in Jakarta on 18 September.

He said that the commodity trade balance between Asean and the EEC was in EEC's favour and that a trade balance marked principally by a one-way flow of goods did not provide opportunities for mutual growth. 'Nor', he continued, 'does it allow for the full range of co-operative ventures to be exploited to mutual benefit.'

Mr Radius said that what was desirable was an active trade relationship between Asean and the EEC and that could not be achieved unless there was two-way, reciprocal action.

In addition to seeking methods to stimulate exports to nations such as those of the EEC, the minister said Asean also welcomed investment from European countries, particularly in small and medium-scale industries.

There were some barriers to more fruitful trading relationships with the EEC he concluded such as quotas, tariffs, and other protectionist measures which, unless altered, would continue to impede the development of an active Asean-EEC partnership.

Choosing a community business partner

The Commission of the European Communities set up the Business Co-operation Centre to encourage co-operation between firms in different member states wishing to increase competitiveness and respond to the opportunities opened up by access to the community's markets. Co-operation is defined as pooling one or more activities of partner firms: for example, in research and development, supplies, production, marketing and sales and management.

A firm seeking the centre's help will be asked to provide certain information about itself, and to define exactly what type of partner and what type of co-operation it wants. All the information supplied, and any inquiries received, are treated as strictly confidential, and no names are revealed without the agreement of all parties. The centre will search its files for a suitable partner, and if the application cannot be matched with an offer already registered, will, if the firm agrees, circulate a summary of the firm's requirements, with no names mentioned to 'correspondents' in every community country.

Readers wishing to obtain further information about the requests for co-operation below should write direct to the centre at the following address, quoting the reference number of the request(s) in which they are interested: Business Co-operation Centre, rue Archimede 17, B-1040 Brussels. The centre makes no charge for its services.

Bakers (BRE/5120/419)
A French bakery with 70 employees and a turnover of 7 million francs and making biscuit dough, wafer biscuits, packed cakes and bulk products for large buyers seeks British partner of comparable size with complementary products (biscuits assortments, madeleines, etc or sweets) with a view to reciprocal complementing of sales programme. Languages: French, English, German.

Fire doors (BRE/5203/316)
A French company with 63 million franc turnover and 330 employees manufacturing interior fire doors, smoke and fire detection systems (55 per cent of turnover) and ladders and movable scaffolding in aluminium alloy (45 per cent of turnover) seeks co-operation with a British or Danish company. The co-operation would consist of a licencing agreement for production and sale of the ladders and scaffolding by the partner and sale of his products eg automatic draught excluders, frames for double-glazed windows selling in kits, do-it-yourself products and hardware for industrial uses, by the French firm.

The French company would consider taking a minority participation in the partner firm's capital. Languages: French, English.

Adhesives (BRE/5188/256.2)
A Dutch company with 30 employees, manufacturing adhesives and latex products, is looking for a financially and commercially strong partner for a close association. Languages: Dutch, German, English.

Furniture (BRE/5266/46)
An Italian joint stock company operating in the furniture sector and specialising in the production of articles for modular living-rooms; turnover 1700 million lira, payroll 50; seeks similar-sized British partner operating in the same sector and producing complementary articles (eg metal furniture and/or rustic period furniture). Initially, co-operation might involve an exchange of marketing networks, to be followed later by an exchange of shares. Languages: French, English, German.

Machinery for timber (BRE/5147/327)
Italian public company in the mechanical engineering sector, producing machinery for the timber industry, with a turnover of DM 8 million and payroll of 80, seeks Irish partner. The partner should have an established position on the market for building materials in his own country and should control the distribution of prefabricated panels. The purpose of co-operation would be to derive joint benefit from the technology developed by the Italian partner, namely, machinery for producing prefabricated panels (composed of wood, cement and chemical additives) to be used in the building industry. The partner should be prepared to enter into some form of financial association with the Italian firm. Languages: German, English, Italian.

Gymnastic equipment (BRE/5143/372)
A French manufacturer of gymnastic and re-educational equipment for hospitals, re-educational centre and kinesitherapists (multi-positioning tables, revalidation aids in wood or metal, etc) selling also complementary material (such as: physio and electrotherapeutic apparatuses, ultrasonic equipment, muscular electrocontraction equipment, infrared lamps), net turnover 4.2 million francs workforce 30, seeks co-operation with an EEC manufacturer of complementary material (ie radiology equipment, hospital furniture, etc). A minority participation or a takeover of the French company would be preferred. Languages: French, English.

Joint sales agreement broke rules of competition

A joint sales arrangment for straight nitrogenous fertilisers between two Dutch companies through a wholly-owned marketing company has been ruled by the European commission to infringe the EEC's rules of competition.

The two companies, Unie van Kunstmestfabricken BV (UKF) and Nederlandse Stickstof Maatschappij (NSM) are the only shareholders in Central Stickstof Verkoopkantor (CSV).

In June 1969 CSV applied for negative clearance under article 2 of council regulation 17.

As the co-operation between NSM and UKF provided for the exchange and joint discussion of information concerning sales forecasts and figures for each product and destination, including deliveries to EEC member states, the commission has found that the regulations do not qualify for negative clearance or for exemption under article 85(3). CSV, UKF and NSM have been ordered to end the infringement of article 85 of the treaty. The text of the decision was published in the *Official Journal of the European Communities* L242, 4 September.

Any further information can be obtained from Department of Prices and Consumer Protection, Fair Trading Division, Millbank Tower, Millbank, London SW1P 4QU, tel. 01-211 7037.

Lords publish study of transport policy

The House of Lords select committee on the European communities published its report on transport policy on 20 September.

This detailed study, the first by a British institution, explains how the EEC, first as a community of six, later of nine, has tried to tackle the long-standing and seemingly intractable inland transport problems of the community's member states.

The report – 43rd Report, HL (1977-78) 255, HMSO – rejects the commonly held view that the EEC's efforts during its first 20 years have been of little value. It shows how the common transport policy evolved from reliance on price mechanisms to measures, however tentative and embryonic, aimed at reforming the structure of inland transport alongside policies for regional development and environmental protection.

Nevertheless the report finds that many states' national railway deficits continue to rise alarmingly and international road freight remains a closed market. Some of the evidence submitted to the committee is critical of the EEC commission's past efforts. Both Dr Hallstein, when president of the commission, and the Secretary of State for Transport, William Rodgers, believe that the community has been excessively concerned with trivia and has spent too much time merely patching up disparate national claims. Mr Rodgers said that the council rarely had the sort of plenary discussions of long-term trends that underly transport policy.

The Lords committee analysed how current EEC objectives – a network of road, rail and waterway trunk routes and a genuinely community-wide transport market – are to be met. It examined to what extent fair competition and harmonisation of national regimes could usefully be achieved and stressed the crucial role of the EEC commission in meeting the problems that were beyond solution by states individually and the need for member states to support well-founded initiatives, and it emphasised that dumping of transport services in Europe should be tackled by intensified co-operation between the EEC and other European bodies – the UN Economic Commission for Europe and the European Conference of Ministers of Transport.

In an appendix Nigel Despicht – formerly director of the transport division of the UN Economic Commission for Europe (currently adviser to the Conference of the Peripheral Maritime Regions of Europe) – surveys international co-operation in European transport from the Rhine commission of 1815 which culminated in the Rome treaty's juridical approach to the problems.

Final report on European seats submitted

The Parliamentary Boundary Commission for England's report, with final recommendations, for the 66 European parliament constituencies in England has been submitted to home secretary Merlyn Rees.

Provisional recommendations were published on 21 and 22 May and representations were invited within a month.

The home secretary will lay the report before parliament with a draft order in council giving effect, with or without modifications, to the recommendations. It is expected that this will be done as soon as possible after parliament re-assembles. If modifications are proposed, a statement of reasons must also be laid. The draft order is subject to approval by both houses of parliament by the affirmative resolution procedure.

The first elections to the European parliament are due to take place in the UK on 7 June 1979.

Temporary suspension of the CCT on aircraft parts

Details of requests for new total duty suspensions to operate from 1 January 1979 on components for maintaining and repairing the Airbus and Mercure were published in *Trade and Industry*, 27 July, page 214. The list omitted the following item:

Tariff heading	Description of goods
ex 40.14 B	Articles of unhardened vulcanised rubber (excluding expanded, foam or sponge rubber) for technical use

If any UK company considers that it could now or in the near future manufacture and supply these articles, so that a suspension of the CCT duty would be detrimental to its interests it should inform the Department of Trade in writing.

This information should be sent to the Department of Trade, General Division, Room 332, Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ, to arrive not later than 6 October.

Inquiries: 01-215 3576.

Tariff quotas 1978 – exhaustions

The UK's share of the following EEC tariff quota for imports from Portugal has also been exhausted:

UK tariff heading/Description of goods	HM Customs serial no. (Part 11 of the UK tariff)
ex22.05 CIIIb)1 IVb)1 Maderia	1286

The following United Kingdom tariff quota for imports of paper and board and printed products from individual Efta countries and Finland (see *Trade and Industry* of 16 December 1977) have also been exhausted:

UK tariff heading	Country of origin	HM Customs serial no. (Part 11 of the UK tariff)
ex 48.01 CII	Finland	1847
ex 48.01 F	Norway	2133
48.05 B	Sweden	2583
48.07 C	Austria	2591
48.07 C	Finland	2702
ex Chap 48	Finland	2915

The community has also announced that the following Efta ceilings have been exhausted and duty reimposed:

UK tariff heading	Country of origin	Date of exhaustion
ex 48.01 F	Finland	12.8.78
48.07 C	Austria	12.8.78
48.15 B	Austria	12.8.78

Inquiries about current tariff quota balances may be made to HM Customs and Excise, Central Tariff Quota Registration Unit, King's Beam House, Mark Lane, London EC3R 7HE. Tel. 01-626 1515, ext. 2570/2295.

Sweet peppers originating in Cyprus

The reduced rate applicable to tariff quota 7262, sweet peppers originating in Cyprus with effect from 1 July has been incorrectly published in part 11B of the tariff as 5.5 per cent. The correct rate is 4.5 per cent. As a result, traders now have the opportunity of submitting retrospective claims to quota at the correct reduced rate in the following circumstances:

1 Where valid claims against quota have already been made on or after 1 July and allowed at the incorrect rate of 5.5 per cent.
2 Where entries presented on or after 1 July have been allowed outside the quota at the preferential rate of 5.4 per cent shown in part 10C of the tariff.

The claims should state:

1 Port of importation } or name and address
2 Name of ship and date of report } of warehouse
3 Entry or free-circulation warrant or number
4 Entered net weight (kg)
5 Which rate was claimed and allowed at import

Claims must be received not later than 13 October and should be made direct to the Central Tariff Quota Unit (ICC3), HM Customs and Excise, King's Beam House, Mark Lane, London EC3R 7HE, tel. 01-626 1515 ext. 2295/2570.

Generalised tariff preference scheme (GSP): restoration of normal duties

Trade and Industry, 2 June, 7 July, 28 July and 18 August gave details of GSP tariff quotas exhausted and GSP ceilings reached up to 8 August. HM Customs has stated that the position on the restoration of normal duties at 5 September is as follows:

I Tariff quotas and special ceilings

Tariff heading/ Description of goods		Customs quota reference	Date UK quota share exhausted	Community butoir or where applicable UK maximum cumulative amount (m.a.) reached: duty re-imposed
ex 41.02 B	Bovine cattle leather	1545		5.9.78 Brazil
51.04	Woven fabrics of man made fibres	3465	24.8.78*	
55.05	Cotton yarn not put up for retail sale:			
BI	Other			
	Measuring per single yarn 120 000 m or more per kg	6208		1.9.78 Peru
56.05	Yarn of mmf			
A	of synthetic textile fibre	3821		5.9.78 Malaysia
56.07	Woven fabrics of mmf			
A	of synthetic textile fibre	3856		5.9.78 Thailand
B	of regenerated textile fibre	6372		26.8.78 South Korea
58.04	Woven pile fabrics	6437	15.8.78*	
58.10	Embroidery	6488	3.8.78*	
ex 59.04	Twine, cordage etc of sisal	4002	30.8.78*	
60.02	Gloves, mittens and mitts	6631	4.7.78	1.9.78 Thailand
61.02	Women's, girls and infants' outer garments	6763	4.7.78	5.9.78 India
61.09	Corsets, corset belts etc	6879		5.9.78 South Korea
62.02	Bed linen	6909	4.7.78	5.9.78 India
62.03	Sacks and bags	6933	8.8.78*	
BIa) ex BIb) ex BII				
69.08	(S/C) Glazed setts etc	7181	18.8.78*	
73.18	Tubes and pipes and blanks therefore etc	4592		5.9.78 Yugoslavia
9703	(S/c) Other toys, working models of a kind used for recreational purposes	5172		5.9.78 South Korea

* Except Group C countries. (S/C) denotes a special ceiling.

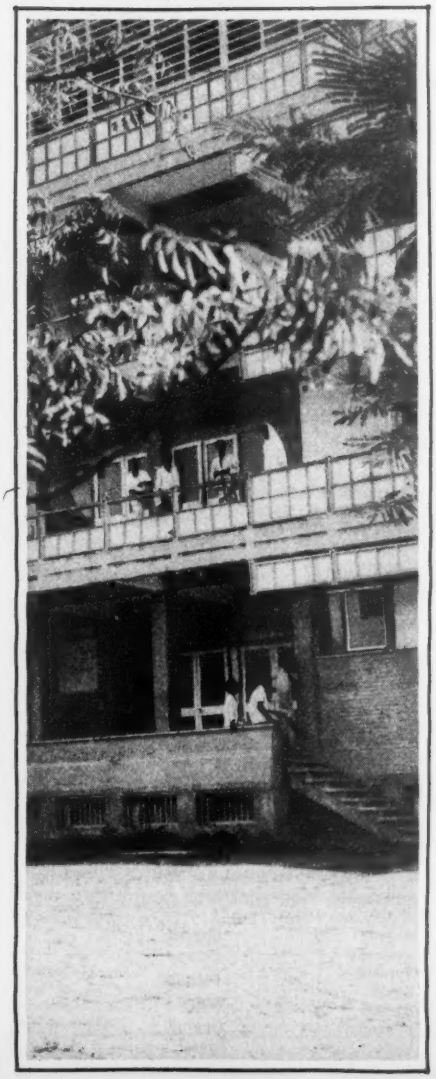
II Ceilings

Tariff heading/Description of goods		Date of restoration of duties: From all sources	From particular sources (inner ceilings)
25.23	Portland cement, cement fondu etc		18.8.78 Yugoslavia
29.22 AI	Methylamine and di- and trimethylamine and their salts		5.9.78 Romania
41.06	Chamois dressed leather		18.8.78 India
46.03	Basketwork, wickerwork and other articles of plaiting materials etc		18.8.78 Yugoslavia 18.8.78 Philippines
55.06	Cotton yarn put up for retail sale		1.9.78 Yugoslavia
61.10	Gloves, mittens, mitts etc not being knitted or crocheted goods	26.8.78*	
69.11	Tableware and other articles commonly used for domestic purposes etc		18.8.78 Yugoslavia
73.14	Iron or steel wire . . . not insulated		18.8.78 Romania
73.31	Nails and tacks etc		18.8.78 Romania
76.03	Wrought plates, sheets and strip of aluminium		26.8.78 Yugoslavia
85.01 C	Knives		8.8.78 Yugoslavia
85.03	Primary cells and primary batteries		8.8.78 Hong Kong
85.18	Electrical apparatus fixed or variable		18.8.78 South Korea
85.20 A	Filament lamps for lighting		18.8.78 Hong Kong
90.09	Image projectors etc	18.8.78*	

* Except Group C countries.

Increasing potential for exports under EEC aid

Export opportunities for British firms under community aid (see 'Trade and Industry', 30 July, 1976) are soon to be increased, thanks to the imminent ratification of EEC aid agreements with Mediterranean countries and a growing aid programme to 'non-associated' countries. We look here at the three major community aid schemes and at prospects for British exporters.



Facade of a hospital in Mogadishu built with an EDF grant.

Over 50 per cent of the fourth European development fund, which is now in full swing, still remains to be committed to projects in the African, Caribbean and Pacific (ACP) countries with whom the EEC has special links. Opportunities for British exporters under this fund are soon to be increased, thanks to the imminent ratification of the EEC aid agreements with Mediterranean countries and a growing aid programme to 'non-associated' countries. Community aid programmes contain a significant proportion of construction, engineering and supplies projects as well as offering many opportunities for consultancies.

The fourth and largest fund

Set up by the Lomé convention, the fourth European development fund (EDF IV) amounts to 3159 million European units of account (Eua) or about £2,100 million. (At the time of writing, 1 Eua equals about £0.67.) The original fund has been augmented to cater for the accession of more ACP states, of which there are now 53, some of the new additions being former dependencies of EEC members. Every ACP state has an indicative programme of projects drawn up jointly by itself and the commission, and approved at meetings attended by British government representatives. Progress in the implementation of the programmes has been steady and, so far, a total of some 1269 million Eua (£850 million) has been committed. The remainder ought to be committed by 1 March 1980, when the Lomé convention expires but, as with previous EDFs, funds will continue to be spent for several years after that date.

Administration of the fund

Administration is handled on a day-to-day basis by commission officials in the EEC development directorate-general, particularly in directorate C (projects), and by the EDF committee, which consists of representatives of the nine member states and a commission chairman. All projects must receive a favourable opinion from the committee, which meets monthly, and be formally approved by the commission before they can be implemented. The committee's consideration takes place on the basis of detailed project-dossiers circulated by the commission before the meeting. Where small projects and programmes are concerned, agreement is given on a more general basis. A separate committee, the article 22 committee, considers projects for European Investment Bank (EIB) funds which, under the terms of the convention, may amount to up to 400 million Eua (£267 million) in the form of loans from the EIBs own resources.

Tendering arrangements

After a project has been approved and the financing convention – the formal promise of funds – has been signed between the recipient country and the commission, the ACP state draws up specifications and calls for tenders. The ACP state itself ultimately chooses which tender to accept, on a competitive basis, following rules designed to ensure fair competition between firms.

Consultancy contracts, which are available for a number of EDF projects, are handled in a slightly different way. Here the commission is responsible for drawing up a short-list of four to six consultants selected from the commission's register and from the officials' own knowledge of suitable firms. Again the ACP state makes the final selection from the short-list. This may be done with or without obtaining complete proposals from all the firms short-listed.

Normally tenders are limited to firms from EEC member states and ACP states, but where a project is joint-financed, for example by the World Bank, the field of competition is sometimes wider to correspond with the requirements of the co-financing body. On contracts for amounts less than 2 million Eua (£1.34 million), a preferential margin of up to 15 per cent is given to firms from ACP states. Eligibility to tender is widest in the case of projects financed by the EIB. Since the bank obtains its finance on the world markets, invitations to tender are open internationally without restriction.

EEC funds for the Mediterranean

Annexed to each association agreement, which the community has signed with many Mediterranean countries, is a protocol dealing with financial and technical co-operation with the country concerned. This co-operation involves both community aid and EIB loans from the bank's own resources. The total amount in question is 1615 million Eua (£1,082 million), of which 250 million Eua (£167.5 million) is in the form of community aid, partly used to 'soften' EIB loans by providing an interest rate subsidy; 983 million Eua (£658.6 million) will be as EIB loans; and the remaining 382 million Eua (255.9 million) will be provided as special loans.

Administration and tendering

Administration of the funds and the tendering procedures will be parallel to those already employed in the context of Lomé. Each country will have an indicative programme of projects which will be considered individually by a special committee, while another committee will consider projects to be financed from EIB resources. The same commission officials responsible for ACP projects will also prepare project-dossiers for Mediterranean countries.

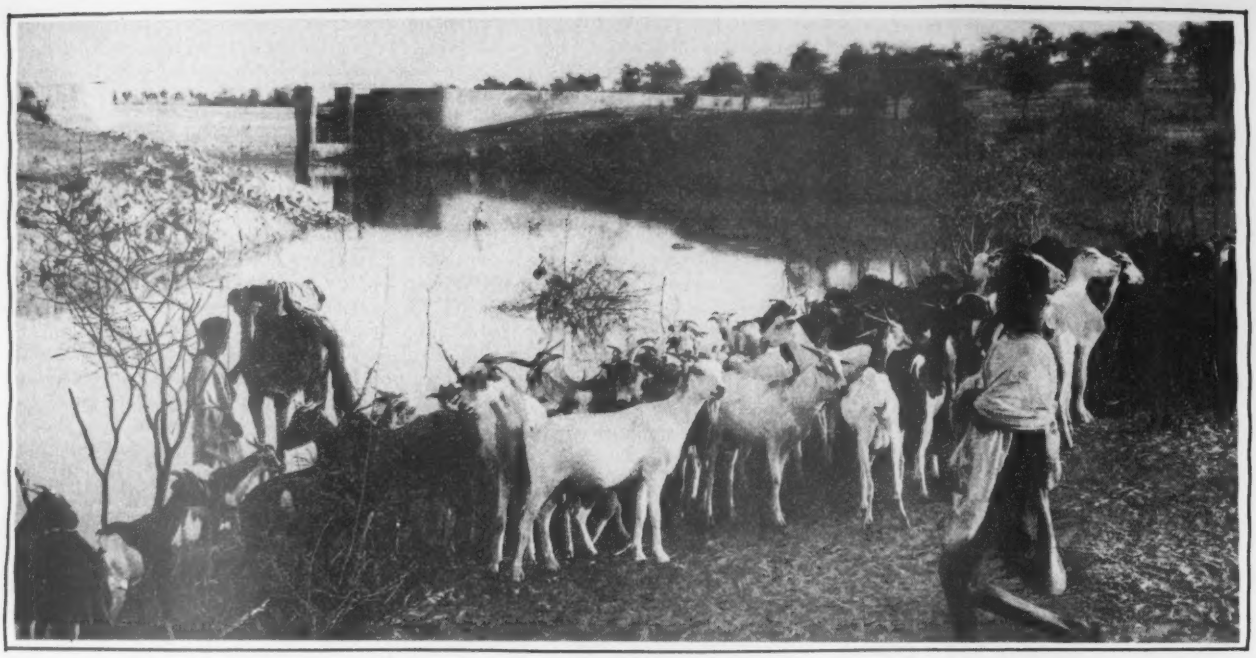
Tendering procedures will be broadly similar to those used for EDF projects. Where finance is to be provided as community aid, invitations to tender will be open to firms from community member states and from the relevant Mediterranean country, whereas contracts arising out of EIB-financed projects will be open to international tenders.

Implementation should start soon

Programmes for several of the Mediterranean countries with which the EEC has signed agreements have already been drawn up and approved, and implementation will proceed as soon as all member states and the recipient countries have completed their respective ratification procedures for the association agreements. The countries whose programmes are closest to implementation are the Maghreb (Algeria, Morocco, Tunisia) and the Mashraq (Egypt, Jordan, Lebanon, Syria).

Aid to non-associates

A third way in which the community provides assistance to the developing world is in the



This and 12 similar agricultural dams were financed by the European development fund.

form of aid to countries not formally associated with the EEC.

The programme of community aid to the 'non-associated' developing countries has so far been agreed annually on an ad hoc basis. However, earlier this year the development council reached a common position on a regulation which, when formally enacted, will provide for a continuing aid programme. It is expected that this programme will expand significantly over the next few years and some 70 million Eua (£46 million) are being committed in 1978.

Commission identification

At present, much of this money has been used to finance projects in conjunction with the World Bank or the Asian Development Bank. Individual projects are identified by the commission in consultation with the recipient state and then approved by the member states. The tendering procedure will, to some extent, depend on which organisation is implementing the projects; however, all contracts will be open to tenders from firms in the member states and the recipient country. Contracts for co-financed projects may sometimes also be open to third countries. Details of the procedures governing tendering and award of contracts have yet to be worked out.

Prospects

The fourth European development fund is the biggest so far, and the body of EEC aid is even more substantial, when the funds to be made available under the Mediterranean financial protocols are considered.

There are, and will continue to be, significant opportunities for British firms in all the fields of work covered by these three major community aid schemes. In addition, negotiations have just begun for a convention to succeed the Lomé convention, and it is virtually certain that a fifth European development fund, for commitment after March 1980, will result. Experience gained in winning business under EDF IV is therefore likely to remain valuable after 1980.

Information about export opportunities . . .

Community aid schemes offer opportunities for the export of a wide range of goods and services from Britain. Many beneficiaries of community aid will be countries with which British exporters have traditional links; others will be less familiar. However, the rules and operations governing community aid are designed to ensure that exporters in all community member states compete on an equal basis.

Information about specific projects and opportunities is readily available. So is advice about how the aid schemes are administered, how projects should be pursued and whom exporters should contact. The commission publicises details of projects and calls for tender in the Official Journal of the European Communities (S series), available from HMSO. But, in addition, information and advice for British exporters is available from a special unit, the projects sub-section of the British Overseas Trade Board, in London, and also from the Office of the United Kingdom Permanent Representative to the European Communities, in Brussels.

Interested exporters are invited to contact, in the first instance, the Projects Sub-Section, British Overseas Trade Board, Export House, 50 Ludgate Hill, London EC4M 7HU, telephone 01-248 5757, ext. 362, 342.

Also available, free of charge, from the projects sub-section are three useful booklets: 'Access to contracts' and 'Programme of projects intended for the fourth EDF', produced by the commission; and 'Opportunities for contracts under EEC aid programmes', produced by the Office of the United Kingdom Permanent Representative to the European Communities, Brussels.

. . . and where they are

ACP states

The ACP states are those African, Caribbean and Pacific developing countries which have signed the Lomé convention.

Bahamas
Barbados
Benin
Botswana
Burundi
Cameroon
Cape Verde
Central African Empire
Chad
Comoros
Congo
Equatorial Guinea
Ethiopia
Fiji
Gabon
Gambia
Ghana
Grenada
Guinea
Guinea-Bissau
Guyana
Ivory Coast
Jamaica
Jibouti
Kenya
Lesotho
Liberia
Madagascar
Malawi
Mali
Mauritania
Mauritius
Niger
Nigeria
Papua-New Guinea
Rwanda
Sao Tome Principe
Senegal
Seychelles
Sierra Leone
Somalia
Sudan
Surinam
Swaziland
Tanzania
Togo
Tonga
Trinidad and Tobago
Uganda
Upper Volta
Western Samoa
Zaire
Zambia

Mediterranean countries

The community will be providing aid under association agreements with the following Mediterranean countries:

Algeria
Morocco
Tunisia
Egypt
Jordan
Lebanon
Syria
Greece
Turkey
Portugal
Malta
Cyprus
Israel

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
			Total	of which: Manufacturing industry	of which: Distributive and service industries excl. shipping	Total	of which: Manufacturing industry	Wholesalers	Retailers	Current balance	Visible balance	Invisible balance
	at 1975 prices		at 1975 prices			at 1975 prices				at current prices		
Base of index Series in Stock level at end-1977	1975	£ million	£ million			£ million 34,469	20,261	4,540	3,181	£ million		
1971	94.5	59 340	20 208	3 923	3 888	235	−277	218	12	1 090	261	829
1972	96.7	62 762	20 239	3 398	4 055	73	−279	173	29	135	−722	857
1973	103.4	65 497	21 609	3 504	4 674	2 983	1 336	432	624	−999	−2 383	1 384
1974	101.4	64 070	21 164	3 822	4 605	1 462	1 288	361	−180	−3 591	−5 235	1 644
1975	100.0	63 192	20 817	3 522	3 841	−1 925	−1 221	−249	−100	−1 855	−3 236	1 381
1976	102.9	63 320	20 489	3 345	3 926	261	316	131	13	−1 137	−3 589	2 452
1977	104.8	62 732	19 738	3 573	4 325	1 051	442	266	29	289	−1 709	1 998
1976 2nd qtr.	102.7	15 785	5 137	828	972	−34	−46	−10	−67	−313	−949	636
3rd qtr.	103.3	15 884	5 168	849	1 005	173	83	81	46	−416	−1 132	716
4th qtr.	104.0	15 927	4 997	856	1 014	211	255	17	27	−329	−958	629
1977 1st qtr.	103.7	15 619	4 794	851	1 030	475	267	82	117	−495	−973	478
2nd qtr.	104.6	15 495	5 025	879	1 044	336	79	179	−4	−297	−762	465
3rd qtr.	105.2	15 777	4 965	910	1 103	−7	−18	−80	−59	574	31	543
4th qtr.	105.7	15 841	4 954	932	1 149	247	115	85	−33	507	−5	512
1978 1st qtr.	106.2	16 361	4 963	920	1 169	336	71	81	62	−317	−612	295
2nd qtr.	107.9	16 373	5 001	971	1 172	258	215	−41	128	198	−135	333
% change last 2 qtrs. on prev. 2 qtrs.	+1.5	+3.5	+0.5	+2.7	+4.0							
on a year earlier	+2.8	+5.2	+1.5	+9.3	+12.9							

	Industrial production		Personal expenditure		Prices and earnings				Labour (UK)			Visible trade (volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices	% increase on a year earlier	Wholesale prices: all manufacturing industry: basic materials and fuel used	Wholesale prices: all manufacturing industry: manufactured products: home sales	Average gross earnings of all employees (GB, all industries and services covered)	Unemployed excluding school leavers and adult students: mid-month count	Unemployed excluding school leavers and adult students: % of total employees	Unfilled vacancies for adults: mid-month count	Export	Import
	at 1975 prices		at 1971 prices	monthly averages	(not seasonally adjusted)				(old series)	thousands		thousands	On a balance of payment basis: at 1975 prices	
Base of index £m in base year Series in	1975	1975	1971 16,296	thousands	Jan. 1974		1975	1975	Jan. 1970	thousands		thousands	1975 19,463	1975 22,699
1971	–	–	100.0	108.5	80.0	9.4	23.2	47.6	118.7	775.8	3.4	130.9	85.4	85.7
1972	–	–	105.3	138.6	85.7	7.1	24.2	5u.1	134.0	854.9	3.7	147.3	85.2	95.3
1973	109.5	108.3	110.3	137.1	93.5	9.1	55.8	66.6	152.1	611.0	2.6	307.0	97.8	108.7
1974	105.1	106.5	109.0	102.8	108.5	16.0	86.3	81.9	179.1	599.7'	2.6'	302.7'	104.3	109.7
1975	100.0	100.0	106.7	97.2	134.8	24.2	100.0	100.0	226.6	929.0	3.9	150.0'	100.0	100.0
1976	102.0	101.4	106.5	104.7	157.1	16.5	127.0	117.3	261.9	1 269.8'	5.4'	120.4'	109.8	105.7
1977	105.9	103.0	103.6	107.1	182.0	15.8	145.6	140.6	288.5	1 378.1	5.8	155.6'	118.9	107.1
1977 1st qtr.	105.7	104.0	103.3	104	174.1	16.5	144.8	133.0	280.0	1 329.5	5.6	..	115.8	109.4
2nd qtr.	105.5	102.5	102.5	103	181.9	17.4	148.8	139.6	285.3	1 340.6	5.6	157.7	118.0	109.6
3rd qtr.	106.5	103.4	104.3	112	184.7	16.5	146.5	143.8	288.3	1 414.6	5.9	151.9	124.4	106.6
4th qtr.	106.0	102.2	104.4	110	187.4	13.1	142.2	145.8	300.4	1 427.8	6.0	160.1	117.6	102.7
1978 1st qtr.	107.2	102.7	106.3	129	190.6	9.5	140.2	149.2	310.8	1 409.4	5.9	187.7	119.9	114.1
2nd qtr.	110.8	104.3	108.0	130	195.8	7.7	146.3	151.8	329.0	1 372.7	5.7	210.3	122.2	109.6
3rd qtr.										1 380.5 p	5.8	213.0		
1977 Oct.	105.8	101.8	102.7	116	186.5	14.1	143.7	145.3	295.8	1 431.5	6.0	156.0	119.0	101.4
Nov.	105.7	101.7	103.1	108	187.4	13.0	142.0	145.7	300.5	1 429.6	6.0	159.4	115.1	98.5
Dec.	106.5	102.9	106.9	104	188.4	12.1	141.0	146.3	304.8	1 422.3	6.0	165.0	118.8	108.1
1978 Jan.	107.0	102.5	104.9	125	189.5	9.9	139.4	148.3	306.3	1 419.2	5.9	180.3	111.7	114.4
Feb.	107.5	102.4	106.8	120	190.6	9.5	139.1	149.2	311.2	1 409.0	5.9	187.0	127.2	111.1
Mar.	107.2	103.2	107.0	142	191.8	9.1	142.0	150.0	314.8	1 400.0	5.9	195.8	120.9	116.7
Apr.	111.1	104.7	106.7	132	194.6	7.9	145.1	150.9	325.7	1 387.1	5.8	203.7	125.7	103.7
May	110.0	103.1	108.4	124	195.7	7.7	146.8	151.9	327.2	1 366.4	5.7	209.9	119.2	113.8
June	111.4	105.1	108.7	133	197.2	7.4	147.0	152.7	334.0	1 364.7	5.7	217.4	121.6	111.3
July	111.8 p	105.1 p	111.4	108	198.1	7.8	145.7 p	153.8 p	332.7 p	1 371.4	5.7	211.0	127.0	115.8
Aug			111½ p	146	199.4	8.0	144.3 p	154.5 p		1 392.1	5.8	209.3	125.0 p	111.4 p
Sep										1 378.1 p	5.8	218.7		
% change latest 3 months on prev. 3 months	+2.3	+1.0	+2.9	−2.8	+2.2		+0.7	+1.8	+4.4	+0.6		+1.3	+2	+1½
on a year earlier	+4.9	+1.5	+6.5	+19.4	+7.7		−1.1	+1.8	+15.8	−2.4		+40.2	+1	+4

p Provisional pe 2nd Preliminary e Estimate .. Not available ' Average of available months

Inquiries: 01-215 3453

Foreign arrivals in the United Kingdom in June

During June 1978, the number of arrivals of foreign nationals entering the UK was 997 000 according to figures released by the Department of Trade and the British Tourist Authority. This represents a small decrease of just under 1 per cent over June 1977. Arrivals for the second quarter of 1978 totalled 2 653 000, a decrease of 3 per cent over the corresponding period of 1977, and those for the first half of the year totalled 4 211 000 a decrease of 2 per cent.

These figures include all nationals of EEC countries except the Irish Republic, and all other foreign nationals, but Commonwealth citizens are excluded. The figures are based on Home Office returns of passengers entering the UK (for details of categories included see notes 1 and 2 at the end of this article).

Continuing the steady downward trend apparent since November 1977, arrivals of nationals of EEC countries in June 1978 were 462 000, a decrease of 6 per cent on the June 1977 figure. On a country basis nationals of Denmark and Italy only showed increases, being of 5 per cent and 12 per cent respectively. Of the remaining EEC countries the largest decreases were of nationals of the Netherlands down 20 per cent) and France (down 6 per cent). Total EEC arrivals for the second quarter of 1978 fell by 6 per cent compared with the same period of 1977, and those for the first half of the year by 4 per cent from 2 313 000 in 1977 to 2 223 000.

Nationals of countries of the rest of western Europe arriving in the UK during June totalled 153 000 compared with 157 000 for June 1977, a decrease of 3 per cent. Increases were recorded in the arrivals of nationals of half of these countries, the largest rises being of nationals of Greece (up 20 per cent) and Yugoslavia (up 19 per cent). The arrivals of nationals of the remaining countries showed decreases, the largest being of nationals of Turkey and Portugal down 48 per cent and 17 per cent respectively. Total arrivals in the second quarter of 1978 of nationals of the rest of western Europe fell by 14 per cent compared with the corresponding period of 1977, and those for the first half of the year by 11 per cent from 718 000 in 1977 to 636 000.

There was a continuation during June 1978 of the increase in the arrivals of nationals of the United States in the UK. The number rose from 231 000 in June 1977 to 243 000, representing an increase of 5 per cent. The total number of United States' nationals arriving in the second quarter of 1978 rose by 6 per cent, and in the first half of the year by 8 per cent from 744 000 in 1977 to 807 000.

Nationals of other foreign countries, arriving in the UK during June 1978 increased by 9 per cent to 139 000 compared with 128 000 in June 1977. Total arrivals for the second quarter of the year of nationals of other foreign countries increased by 8 per cent over the corresponding period of 1977, and those for the first half of 1978 by 6 per cent from 512 000 in 1977 to 545 000.

The rise in the number of arrivals of nationals of Asian countries, excluding Japan, continued in June with a 22 per cent increase. Arrivals of east European nationals were also up (6 per cent), and those of Latin America (up 29 per cent). For the first half of 1978 arrivals of nationals of Asian countries, excluding Japan, rose by 20 per cent, and also those of eastern Europe and Latin America by 5 per cent and 22 per cent respectively. Arrivals of nationals of Japan increased by 8 per cent in June 1978, and by 3 per cent in the second quarter of the year, but compared with the equivalent period of 1977 there was a decrease for the first six months of 1978 of 2 per cent.

Notes

1 The figures, collected by the Home Office, record the number of journeys made, so that a person who makes more than one journey is counted on each occasion. The figures for any particular country relate not to the place from which the passenger travelled, but to the fact that he or she was a foreign national admitted on the basis of holding a passport of that country.

2 Figures for the nationals of non-EEC countries include stateless persons, while an estimated addition has been made to the Home Office figures for the appreciable number of United States passengers arriving via the Irish Republic. All figures for non-EEC arrivals relate to visitors given leave to enter for less than 12 months, ie holidaymakers, business visitors, people coming to stay as guests of relatives or friends, other tourists, and those coming for permit-free employment for less than 12 months, and also include passengers given leave to enter for any period for the purpose of taking up a course of study. These categories comprise approximately 90 per cent of all arrivals. For EEC countries, all arrivals are shown, irrespective of the passengers' purpose of visit or expected length of stay. This follows the entry of the UK into the EEC, since when citizens of community countries are generally admitted to the UK without having to state their purpose of visit or expected length of stay.

3 Seasonally adjusted figures: Simple comparisons of monthly figures between one year and another, or between adjacent months, must be interpreted with caution. The seasonally adjusted figures may provide a better basis for comparison with other months or for judging current trends. In estimating the seasonal adjustments, allowance has been made for changes in the seasonal pattern, which have been in the direction of a spreading of the tourist season, with some reduction in the summer peak relative to the rest of the year. Adjustment was also made for the effect of the varying date of Easter on numbers of western European arrivals. The seasonally adjusted series are liable to revision when subsequent figures become available and should therefore, for the most recent months, be viewed with caution.

Inquiries: 01-212 5555.

Foreign arrivals

Thousands per month

	Total arrivals of nationals of EEC countries (excluding Irish Republic) [1]		Foreign arrivals from non-EEC countries [2]							
			Nationals of rest of western Europe (non-EEC)		Nationals of United States		Nationals of other foreign countries		Total nationals of non-EEC countries	
1968	144		34		73		29		136	
1969	174		40		95		35		170	
1970	199		47		117		41		205	
1971	214		53		129		46		228	
1972	232		59		134		51		244	
1973	265		70		131		62		263	
1974	280		75		107		68		250	
1975	314		87		99		80		267	
1976	379		113		121		89		322	
1977	438		133		144		107		383	
1977	UA	SA	UA	SA	UA	SA	UA	SA	UA	SA
January	224	423	84	144	68	142	66	100	217	385
February	260	499	89	146	56	138	61	103	206	387
March	355	423	113	139	85	136	85	106	283	381
April	495	456	149	141	123	144	79	103	352	388
May	490	447	125	141	181	152	94	107	400	400
June	489	439	157	131	231	154	128	112	516	397
July	927	457	270	135	245	141	202	111	717	387
August	669	433	155	125	212	141	181	110	548	376
September	410	419	128	121	196	134	135	105	459	360
October	395	438	131	128	158	163	99	106	387	399
November	278	430	101	123	87	136	79	114	266	373
December	266	394	90	118	83	144	74	105	246	367
1978										
January	212	402	77	131	74	152	70	106	221	389
February	217	416	73	119	60	146	68	113	201	378
March	405	431	116	126	102	163	83	104	302	393
April	444	451	115	123	127	148	84	109	326	380
May	483	438	103	116	200	168	100	114	404	398
June	462	430	153	120	243	162	139	122	535	404
Jan-June 1977	2 313		717		744		512		1 975	
Jan-June 1978	2 223		636		807		545		1 988	

[1] Total arrivals: all nationals of EEC countries admitted to the UK irrespective of intended length of stay or purpose (excluding Irish Republic). [2] Foreign arrivals (non-EEC): nationals of countries other than EEC or the Commonwealth admitted for less than one year for selected purposes – see note 2. UA = Unadjusted, Home Office. SA = Seasonally adjusted, Department of Trade.

Machine tools receive home market support

Metal-working machine tool sales and orders in June

There was a small fall in the current value of machine tool sales between the first and second quarters of 1978. The current value of total new orders received exceeded the level of sales with a decline in export orders being out-weighed by an increase in home order books. Employment continued to decline in June to rest at 51 200 at the end of the second quarter.

Recent trends

The provisional estimate for June 1978 together with the revised estimates for April and May show that sales of machine tools by UK manufacturers fell by 4 per cent in current values between the first and second quarters but rose by 27 per cent compared with a year earlier. These figures include the effects of price increases and seasonal changes. Taking account of these the volume of sales in the second quarter is judged to have fallen back somewhat compared with the first but was probably significantly higher than in the same period a year earlier.

The overall intake of new orders (net of cancellations) in the second quarter was about 2 per cent lower than the previous quarter and very similar to the level a year earlier. Total new orders were valued at £122 million in the second quarter which exceeded the level of sales by 5 per cent, hence order books increased in current price terms by about 2 per cent. An increase of 8 per cent between the first and second quarters took home new orders up to £90 million in the latter period but this was off-set to some extent by a fall of 13 per cent in new orders from abroad. Compared with a year earlier home new orders in the second quarter were 3 per cent higher, while new export orders were 10 per cent lower. In volume terms total new orders fell somewhat in the second quarter and were significantly lower than in the same period a year earlier.

Overall order books stood at £267 million at the end of the second quarter 1978, only 2 per cent higher than March and less than 6 per cent higher than a year earlier. Home order books continued to rise to £181 million by the end of the second quarter, 29 per cent higher than a year earlier. Export orders-on-hand however fell between the first and second quarters by 9 per cent, to £86 million.

Table 1 **Metal-working machine tools: orders and sales**

£ million current values

	Sales			Orders on hand [1]			Net new orders		
	Total	Home	Export	Total	Home	Export	Total	Home	Export
1972	184.7	111.6	73.1	113.3	55.7	57.6	192.0	121.3	70.7
1973	213.2	129.1	84.1	216.0	120.4	95.6	315.9	193.8	122.1
1974	254.4	149.9	104.5	312.9	164.1	148.8	347.9	191.9	156.0
1975	325.4	186.4	139.0	229.8	117.6	112.2	246.8	144.7	102.1
1976	352.0	208.6	143.4	193.5	100.9	92.6	315.7	191.9	123.8
1977	395.2	245.4	149.8	260.6	158.8	101.8	462.3	303.3	159.0
1976									
3rd	76.0	47.0	29.0	203.9	109.8	94.1	89.3	54.9	34.4
4th	100.1	63.4	36.7	193.5	100.9	92.6	89.7	54.5	35.2
1977									
1st qtr	99.5	61.7	37.8	221.2	109.8	111.4	127.2	70.6	56.6
2nd	90.8	57.2	33.6	252.6	139.8	112.8	122.2	87.2	35.0
3rd	97.2	60.7	36.5	260.1	150.0	110.1	104.7	70.9	33.8
4th	107.7	65.8	41.9	260.6	158.8	101.8	108.2	74.6	33.6
1978									
1st qtr	119.7	76.1	43.6	260.4	166.0	94.4	119.5	83.3	36.2
2nd p	115.4	75.1	40.3	266.7	181.0	85.7	121.7	90.1	31.6
1977									
April	27.3	17.4	9.9	227.0	115.2	111.8	33.1	22.8	10.3
May	32.4	20.2	12.2	238.4	128.0	110.4	43.8	33.0	10.8
June	31.1	19.6	11.5	252.6	139.8	112.8	45.3	31.4	13.9
July	28.3	18.9	9.4	256.3	145.8	110.5	32.0	24.9	7.1
August	31.8	20.9	10.9	259.2	146.9	112.3	34.7	22.0	12.7
September	37.1	20.9	16.2	260.1	150.0	110.1	38.0	24.0	14.0
October	34.3	19.9	14.4	252.7	150.2	102.5	26.9	20.1	6.8
November	36.4	21.8	14.6	257.8	155.3	102.5	41.5	26.9	14.6
December	37.0	24.1	12.9	260.6	158.8	101.8	39.8	27.6	12.2
1978									
January	34.3	21.6	12.7	263.3	163.5	99.8	37.0	26.3	10.7
February	38.0	24.4	13.6	268.8	168.9	99.9	43.5	29.8	13.7
March	47.4	30.1	17.3	260.4	166.0	94.4	39.0	27.2	11.8
April r	30.1	18.3	11.8	275.6	181.0	94.6	45.3	33.3	12.0
May r	45.1	29.8	15.3	267.4	177.3	90.1	36.9	26.1	10.8
June p	40.2	27.0	13.2	266.7	181.0	85.7	39.5	30.7	8.8
Three monthly totals:									
April-June 1978	115.4	75.1	40.3	266.7	181.0	85.7	121.7	90.1	31.6
Jan-March 1978	119.7	76.1	43.6	260.4	166.0	94.4	119.5	83.3	36.2
April-June 1977	90.8	57.2	33.6	252.6	139.8	112.8	122.2	87.2	35.0
Percentage change latest three months on:									
1 Previous three months	−4	−1	−8	+2	+9	−9	−2	+8	−13
2 A year earlier	+27	+31	+20	+6	+29	−24	—	+3	−10

[1] The values for orders outstanding relate to the ends of the periods shown. p Provisional. r Revised.

Employment

Recent movements in the employment estimates indicate that employment fell slightly in the second quarter of 1978 continuing the downward trend which has been evident since the beginning of the year.

Table 2 **Metal-working machine tools: employment estimates**

Thousands

1976		1977		1978	
1st qtr	51.2	1st qtr	51.0	1st qtr	51.7
2nd	50.3	2nd	51.0	2nd	51.4
3rd	50.8	3rd	51.6		
4th	50.9	4th	52.2	**1978**	
				Jan	51.8
				Feb	51.7
				Mar	51.6
				Apr	51.5
				May	51.4
				June p	51.2

r Revised. p Provisional.

Adjustment of estimates

The monthly estimates up to and including March 1978 have been adjusted to be consistent with the more comprehensive quarterly inquiry and the latest provisional estimates will be revised when the appropriate information becomes available. Net new orders and orders-on-hand have been adjusted to the same basis of coverage and valuation as sales.

The monthly statistics will be published in Business Monitor PM 332 and full details of the quarterly inquiry can be found in Business Monitor PQ 332.

Inquiries on the published series should be addressed to the Department of Industry, Mechanical Engineering Statistics, Room 605, Dean Bradley House, Horseferry Road, London SW1P 2AG, tel. 01-212 0687.

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Motor vehicle production in August

Car production in the four weeks ending 26 August of 88 874 units (22 219 per week) was 12 per cent above the August 1977 level. In the eight months to August 1978, car production was 2 per cent higher than in the same period last year, production for export falling by 5 per cent while that for the home market rose by 8 per cent.

Commercial vehicle production of 21 267 units (5317 per week) was 9 per cent below the August 1977 level. Production in the first eight months to August was 1 per cent above that in the corresponding period last year. Production for export fell by 11 per cent while production for the home market rose by 14 per cent.

(The summaries which follow are based on the seasonally adjusted figures in table 2.)

Cars

Car production in August of 115 100 units was 5 per cent above the average monthly level in 1977. Output in the three months June to August fell by 10 per cent compared with the preceding three months; within the total, production for export fell by 19 per cent while production for the home market fell by 4 per cent.

Commercial vehicles

Commercial vehicle production in August of 31 200 units was 6 per cent below the average monthly level in 1977. In the period June to August, output fell by 8 per cent as compared with the preceding three months. Output for the home market fell by 4 per cent while that for export fell by 13 per cent.

Inquiries: 01-212 0788.

Table 1 **Car and commercial vehicle production**

Production figures of road motor vehicles cover complete vehicles, chassis with engines for delivery as such and unassembled vehicles for export. Road tractors are included but battery-operated road vehicles are excluded.

	No of weeks	Passenger cars (including taxis)				Commercial road vehicles			
		For home market	For export	Totals	Weekly average	For home market	For export	Totals	Weekly average
1969	53	892 758	824 315	1 717 073	32 398	272 998	192 778	465 776	8 788
1970	52	918 109	722 857	1 640 966	31 557	267 407	190 125	457 532	8 799
1971	52	1 027 462	714 478	1 741 940	33 499	268 278	187 928	456 206	8 773
1972	52	1 307 881	613 430	1 921 311	36 948	272 649	135 470	408 119	7 848
1973	52	1 142 216	605 105	1 747 321	33 602	257 574	159 049	416 623	8 012
1974	52	937 932	596 187	1 534 119	29 502	232 373	170 193	402 566	7 742
1975	52	735 532	532 164	1 267 696	24 379	194 319	186 386	380 705	7 321
1976	53	768 481	564 968	1 333 449	25 159	182 554	189 503	372 057	7 020
1977	52	753 195	562 777	1 315 972	25 307	201 445	196 823	398 268	7 659
1978	52								
1977									
1st qtr	13	180 813	149 558	330 371	25 413	51 826	57 676	109 502	8 423
2nd	13	209 665	161 386	371 051	28 542	49 299	51 945	101 244	7 788
3rd	13	166 116	104 554	270 670	20 821	44 036	41 832	85 868	6 605
4th	13	196 601	147 279	343 880	26 452	56 284	45 370	101 654	7 820
1978									
1st qtr	13	210 561	147 930	358 491	27 576	54 949	48 733	103 682	7 976
2nd	13	223 890	138 932	362 822	27 909	61 944	50 322	112 266	8 636
3rd	13								
4th	13								
1977									
January	4	66 119	54 069	120 188	30 047	16 932	17 402	34 334	8 584
February	4	49 573	46 109	95 682	23 921	15 376	17 822	33 198	8 300
March	5	65 121	49 380	114 501	22 900	19 518	22 452	41 970	8 394
April	4	64 475	48 998	113 473	28 368	13 394	16 133	29 527	7 382
May	4	80 099	60 057	140 156	35 039	18 860	20 020	38 880	9 720
June	5	65 091	52 331	117 422	23 484	17 045	15 792	32 837	6 567
July	4	47 156	27 939	75 095	18 774	13 007	14 020	27 027	6 757
August	4	51 565	27 605	79 170	19 793	12 628	10 869	23 497	5 874
September	5	67 395	49 010	116 405	23 281	18 401	16 943	35 344	7 069
October	4	55 346	47 810	103 156	25 789	19 283	14 863	34 146	8 537
November	4	63 333	49 199	112 532	28 133	18 198	12 807	31 005	7 751
December	5	77 922	50 270	128 192	25 638	18 803	17 700	36 503	7 301
1978									
January	4	67 488	43 961	111 449	27 862	16 396	14 717	31 113	7 778
February	4	65 029	42 883	107 912	26 978	15 699	14 959	30 658	7 665
March	5	78 044	61 086	139 130	27 826	22 854	19 057	41 911	8 382
April	4	68 388	50 721	119 109	29 777	18 802	16 169	34 971	8 743
May	4	76 240	45 363	121 603	30 401	20 824	16 990	37 814	9 454
June	5	79 262	42 848	122 110	24 422	22 318	17 163	39 481	7 896
July	4	40 644r	24 273r	64 917	16 229	15 209r	12 032r	27 241r	6 810r
August	4	51 205	37 669	88,874	22 219	12 207	9 060	21 267	5 317

Note: From January 1978, Land-Rover estate vehicles are being recorded as commercial vehicles rather than as passenger cars. Figures for 1977 have been revised on to this basis. The number of these vehicles in 1977 was 11 848.

Table 2 **Production seasonally adjusted**

Monthly average — Thousands

	Passenger cars			Commercial vehicles		
	For home market	For export	Total	For home market	For export	Total
1969	74	69	143	22.7	16.1	38.8
1970	77	60	137	22.3	15.8	38.1
1971	86	59	145	22.3	15.7	38.0
1972	109	51	160	22.7	11.3	34.0
1973	95	50	145	21.5	13.2	34.7
1974	78	50	128	19.3	14.2	33.5
1975	61	45	106	16.2	15.5	31.7
1976	64	47	111	15.2	15.8	31.0
1977	63	47	110	16.8	16.4	33.2
1978						
1977						
1st qtr	56	49	105	16.2	18.6	34.8
2nd	67	50	117	16.1	16.3	32.4
3rd	67	42	109	17.4	16.5	33.9
4th	61	47	108	17.5	14.3	31.8
1978						
1st qtr	68	49	117	17.5	16.2	33.7
2nd	71	42	113	20.0	15.4	35.4
1977						
January	63	58	121	17.6	19.1	36.7
February	52	47	99	15.4	17.9	33.3
March	54	43	97	15.6	18.6	34.2
April	70	52	122	14.6	17.6	32.2
May	69	53	122	18.1	17.8	35.9
June	63	45	108	15.7	13.5	29.2
July	64	41	105	16.8	16.6	33.4
August	66	36	102	17.6	16.7	34.3
September	70	50	120	17.8	16.1	33.9
October	55	48	103	18.1	15.2	33.3
November	58	46	104	17.1	12.8	29.9
December	70	46	116	17.1	15.0	32.1
1978						
January	65	47	112	17.2	16.3	33.5
February	68	44	112	15.9	15.2	31.1
March	69	57	126	19.5	16.9	36.4
April	71	50	121	19.5	16.8	36.3
May	66	40	106	20.2	15.2	35.4
June	75	36	111	20.2	14.3	34.5
July	56	36	92	19.9r	14.3	34.2r
August	66	49	115	17.1	14.0	31.1
Average of						
Mar-May 78	69	49	118	19.7	16.3	36.0
Jun-Aug 1978	66	40	106	19.0	14.3	33.3
Percentage change	−4	−19	−10	−4	−13	−8

Notes to table 2: The seasonally adjusted series has been adjusted to exclude the effect of regularly recurring influences (eg holidays) but the figures still reflect the effect of factors that do not recur regularly (eg strikes).

Care should be taken not to interpret changes between one month and another as necessarily indicating the underlying trend. The averages in the latest three months and the previous three months give a more reliable guide to recent changes.

Statistical News

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Capital expenditure of the manufacturing, distributive and service industries: second quarter

Revised estimates of the volume of investment in the manufacturing and the distributive and service industries confirm the pattern indicated by the provisional results.

Manufacturing industry

The revised estimate of the volume of investment by manufacturing industry is £971 million at 1975 prices, seasonally adjusted, some £7 million below the provisional estimate, but confirming the rise of about 6 per cent above the level of the depressed first quarter. A better guide to the underlying trend is given by considering the first two quarters of 1978 together: the volume of investment in the first half of 1978 was 3 per cent above that of the second half of 1977.

On the basis of the same half-yearly comparison investment by type of asset showed increases of 2 and 3 per cent for new building work and plant and machinery respectively and a fall of 1 per cent in vehicles. In the second quarter investment in all three assets rose compared with the first quarter with the volume of investment in both plant and machinery and new building work increasing by 6 per cent and in vehicles by 3 per cent.

Since investment by industry group is generally more erratic than for manufacturing as a whole, all comparisons have been made for the two most recent quarters compared with the preceeding two. On this basis volume increases of around 25 per cent were recorded for the coal and petroleum products and the drink and tobacco industry groups. Other large increases occurred in the vehicles industry (16 per cent) and the paper, printing and publishing and the instrument and electrical engineering industries (both up by 11 per cent).

Four industry groups recorded falls in the volume of investment. The iron and steel industry declined by 21 per cent and the residual 'Other' manufacturing by 10 per cent. Smaller falls were recorded for the textiles, leather and clothing and the non-ferrous metals industries.

Around average increases were shown for the food and the chemicals industries whilst investment by the engineering group of industries, excluding electrical and instrument engineering, was unchanged.

Table 1 **Fixed capital expenditure at 1975 prices seasonally adjusted of manufacturing, distributive and service industries**

£ million

		Analysis by industrial sectors			Analysis by type of asset		
Period	Total	Manufacturing industries	Distributive and service industries (excluding shipping)	Shipping industry	New building work	Vehicles	Plant and machinery
1966	6 523	3 497	2 825	201	2 434	1 075	3 015
1967	6 680	3 412	2 985	283	2 439	1 150	3 091
1968	7 386 (7 232) [1]	3 642 (3 549)	3 262 (3 251) [1]	483 (433) [1]	2 510	1 431 (1 381) [1]	3 446 (3 342) [1]
1969	7 763 (7 917) [1]	3 898 (3 991)	3 478 (3 489) [1]	387 (437) [1]	2 716	1 386 (1 436) [1]	3 661 (3 765) [1]
1970	8 470	4 196	3 669	605	2 766	1 603	4 101
1971	8 413	3 923	3 888	602	2 870	1 546	3 997
1972	8 249	3 398	4 055	796	2 585	1 891	3 774
1973	8 997	3 504	4 674	818	2 740	2 097	4 160
1974	9 112	3 822	4 605	685	2 656	2 010	4 446
1975	7 929	3 522	3 841	565	2 158	1 590	4 181
1976	7 601	3 345	3 926	329	1 993	1 552	4 056
1977	8 296	3 573	4 325	398	1 998	1 768	4 530
1972							
1st qtr	2 047	901	965	181	653	431	963
2nd	2 069	841	1 016	211	650	478	941
3rd	2 024	829	1 015	180	632	466	926
4th	2 110	827	1 059	224	650	516	944
1973							
1st qtr	2 304	878	1 167	259	708	571	1 026
2nd	2 168	845	1 157	166	683	471	1 015
3rd	2 224	912	1 158	154	697	483	1 044
4th	2 300	869	1 192	239	652	573	1 076
1974							
1st qtr	2 300	951	1 224	124	713	468	1 119
2nd	2 269	948	1 160	161	668	494	1 107
3rd	2 267	948	1 117	202	651	529	1 086
4th	2 276	975	1 104	197	625	518	1 133
1975							
1st qtr	2 076	942	967	167	572	438	1 065
2nd	2 027	901	967	159	562	405	1 061
3rd	1 957	850	967	140	526	385	1 047
4th	1 868	830	940	99	498	362	1 008
1976							
1st qtr	1 840	813	936	92	508	367	965
2nd	1 854	828	972	54	496	362	996
3rd	1 975	849	1 005	121	498	442	1 035
4th	1 932	856	1 014	62	491	380	1 061
1977							
1st qtr	1 988	851	1 030	107	476	437	1 075
2nd	2 024	879	1 044	101	470	445	1 109
3rd	2 111	910	1 103	98	516	451	1 144
4th	2 174	932	1 149	93	535	436	1 203
1978							
1st qtr	2 156	920	1 169	68	503	438	1 215
2nd	2 191	971	1 172	48	524	419	1 248

The figures given above cover a wide sector of the economy, accounting – after exclusion of dwellings – for some 48 per cent of all UK gross domestic fixed capital formation in 1976. The scope of manufacturing and the distributive and service industries is defined in the notes at the end of the article, and falls very largely in the private sector of the economy, although some public sector elements are included as appropriate (notably the British Steel Corporation, in manufacturing industry). Exploration and development work in the North Sea (order II is excluded.)

[1] After allowing for expenditure, brought forward into 1968 and 1969 to secure the higher rate of investment grants which ended on 31 December 1968: estimated at £93 million for manufacturing industry, £11 million for distributive and service industries, and £50 million for shipping. The estimate for shipping is particularly uncertain because of the erratic nature of this industry's capital expenditure, while that for the distributive and service industries is uncertain because of the smallness of the effect.

Distributive and service industries

Revised estimates confirm that the capital expenditure of the distributive and service industries (excluding shipping) in the second quarter of 1978 was £1,172 million, at 1975 prices, seasonally adjusted. In the first half of 1978, investment by these industries was about 13 per cent higher than in the first half of 1977, and some 4 per cent more than in the second half. Compared with the outcome for the second half of 1977, investment in new building work in the first half of 1978 was about 3 per cent lower, but expenditure on vehicles was 8 per cent higher, and on plant and machinery, 7 per cent higher.

In the classification by industry, wholesalers' investment in the first half of 1978 was about 8 per cent lower than in the second half of 1977, while the expenditure in retail distribution increased by 6 per cent, and in the residual group of industries, by some 5 per cent.

Shipping industry

The revised estimate of investment by the shipping industry in the second quarter is about £48 million, at 1975 prices, seasonally adjusted, some £9 million more than the pro-

Notes to tables

Capital expenditure comprises expenditure on vehicles (including ships) and plant and machinery less receipts from sales of these assets, and on new building work.

The analysis by industry group follows the standard industrial classification revised 1968 edition:

Manufacturing orders III to XIX

Distributive trades order XXIII

Wholesale MLH 810, 811, 812, 831, 832 (except leasing by finance houses and similar businesses)

Retail MLH 820, 821

Other industries order XX (construction): XXII (transport and communication) excluding 701 – railways, 706 – port and inland water transport, 707 – air transport and 708 – postal services and telecommunications: XXIV (insurance, banking, finance and business services) including leasing by finance houses and similar businesses and excluding Trustee Savings Banks; XXV (professional and scientific services) excluding 872 – educational services and 874 – medical and dental services; and XXVI (miscellaneous services).

SIC orders I (agriculture, forestry and fishing), II (mining and quarrying), XXI (gas, electricity and water), and XXVI (public administration and defence) are completely excluded.

The estimates with the exception of those for manufacturing industry in table 2, are shown to the nearest £m but should not be regarded as accurate to this degree and care should be taken in using the industry figures in tables 2 and 3, because of the margin of error involved in the quarterly seasonal adjustments. Also, there may be an apparent discrepancy between the total and the sum of the constituent parts due to rounding.

See also footnotes to table 1.

Table 2 Fixed capital expenditure of manufacturing industry at 1975 prices seasonally adjusted

£ million

Period	Total all manufacturing industries	Analysis by industry group: Food, drink and tobacco: Food [1]	Drink and tobacco [1]	Coal and petroleum Products	Chemicals	Iron and steel	Non-ferrous metals	Engineering, shipbuilding and metal goods: Instrument and electrical engineering [2]	Other	Vehicles	Textiles leather and clothing	Paper, printing and publishing	Other manufacturing industries	Analysis by type of asset: New building work	Vehicles	Plant and machinery
1970	4 196.4	503.8		176.5	785.6	318.1	200.0	807.5		434.2	314.3	262.8	393.6	1 000.2	222.0	2 974.2
1971	3 922.5	505.3		251.9	683.6	467.6	131.8	708.9		274.9	265.0	214.7	418.8	905.2	222.0	2 795.3
1972	3 397.8	519.4		214.9	492.2	439.7	77.3	640.8		179.2	217.0	194.3	423.0	738.0	239.4	2 420.4
1973	3 504.1	297.4	269.6	86.1	389.3	347.1	63.3	263.7	508.9	259.3	314.5	225.6	479.3	738.7	260.1	2 505.3
1974	3 822.0	318.8	254.4	92.6	440.1	416.0	78.3	299.4	553.7	315.9	336.7	249.0	467.1	727.1	273.6	2 821.3
1975	3 521.9	285.1	181.0	111.3	545.5	513.2	77.7	258.3	501.9	269.8	233.4	210.8	333.9	639.9	199.9	2 682.1
1976	3 345.3	268.9	168.3	90.1	556.0	585.2	51.2	254.0	468.1	247.9	170.9	177.9	306.8	513.9	239.7	2 591.7
1977	3 572.6	360.5	217.3	75.4	622.3	451.1	61.0	304.8	502.6	287.2	150.8	173.3	366.3	547.1	285.8	2 739.7
1973																
1st qtr	878.0	80.3	70.2	38.1	101.9	97.7	15.7	63.2	113.2	59.4	70.8	57.4	110.1	179.1	66.2	632.7
2nd	845.3	67.9	61.6	38.7	99.9	63.3	13.8	66.9	125.6	61.5	71.6	55.7	118.8	178.8	61.9	604.6
3rd	911.7	71.6	65.8	30.2	94.1	97.6	16.8	64.6	135.8	68.2	85.8	56.3	124.9	192.2	66.0	653.5
4th	869.1	77.6	72.0	−20.9	93.4	88.5	17.0	69.0	134.3	70.2	86.3	56.2	125.5	188.6	66.0	614.5
1974																
1st qtr	951.1	84.3	68.3	21.0	100.6	89.1	18.2	71.5	144.7	79.2	86.6	58.3	129.3	191.6	68.4	691.1
2nd	948.3	76.5	71.3	20.8	103.1	97.4	21.2	73.8	134.0	79.9	87.2	63.7	119.4	182.1	69.2	697.0
3rd	947.5	80.5	61.9	23.6	108.4	95.9	19.4	76.6	138.4	81.1	85.3	62.9	113.5	174.8	69.8	702.9
4th	975.1	77.5	52.9	27.2	128.0	133.6	19.5	77.5	136.6	75.7	77.6	64.1	104.9	178.6	66.2	730.3
1975																
1st qtr	941.7	76.5	50.5	27.4	140.2	111.7	30.4	71.9	136.1	75.5	67.5	58.5	95.5	176.7	54.3	710.7
2nd	900.8	72.9	46.7	30.1	140.7	123.6	15.0	67.3	133.8	70.5	59.4	53.0	87.8	167.6	47.5	685.7
3rd	849.9	69.0	34.7	32.5	138.3	135.5	16.6	58.4	122.6	61.3	53.8	52.7	74.5	155.9	47.8	646.2
4th	829.5	66.7	49.1	21.3	126.3	142.4	15.7	60.7	109.4	62.5	52.7	46.6	76.1	139.7	50.3	639.5
1976																
1st qtr	813.0	63.6	38.3	27.8	125.7	154.6	14.0	63.3	109.3	52.5	47.6	46.3	70.0	135.0	53.6	624.4
2nd	827.8	64.3	35.9	22.5	137.0	155.7	12.0	60.0	116.3	62.7	43.4	45.9	72.1	126.3	60.7	640.8
3rd	848.7	69.9	47.2	19.8	144.9	147.6	12.0	63.5	114.5	63.9	41.0	43.5	80.9	126.9	62.3	659.5
4th	855.8	71.1	46.9	20.0	148.4	127.3	13.2	67.2	128.0	68.8	38.9	42.2	83.8	125.7	63.1	667.0
1977																
1st qtr	851.2	81.8	52.1	15.5	142.0	124.9	12.6	69.3	119.6	64.2	39.2	42.2	87.8	128.2	70.0	653.0
2nd	879.1	92.4	57.5	18.8	150.8	111.4	14.8	73.4	125.1	64.2	38.3	42.3	90.1	134.4	75.5	669.2
3rd	910.2	94.1	58.0	18.0	163.3	102.1	17.0	83.2	128.8	74.4	35.7	44.6	91.0	139.3	69.2	701.7
4th	932.1	92.2	49.7	23.1	166.2	112.7	16.6	78.9	129.1	84.4	37.6	44.2	97.4	145.2	71.1	715.8
1978																
1st qtr	920.1	89.3	71.4	22.4	171.4	85.2	15.2	88.4	128.8	78.6	35.3	48.9	85.2	140.9	68.7	710.5
2nd	971.3	109.5	62.0	30.0	173.9	85.3	16.8	92.2	128.9	104.9	33.5	50.0	84.3	148.8	70.5	752.0

[1] These columns represent the division of the columns 'food, drink and tobacco, engineering, shipbuilding and metal goods', formerly shown. This split is not available for years 1970 to 1972.

Table 3 Fixed capital expenditure in the distributive and service industries (excluding shipping) at 1975 prices seasonally adjusted

£ million

Period	Total	Analysis by industry group: Wholesale distribution	Retail distribution	Other industries [2]	Analysis by type of asset: New building work	Vehicles	Plant and machinery
1968	3 262 (3 251) [1]	345	539	2 377 (2 366) [1]	1 640	751	870 (859) [1]
1969	3 478 (3 489) [1]	332	552	2 594 (2 605) [1]	1 710	794	974 (985) [1]
1970	3 669	365	547	2 757	1 752	803	1 114
1971	3 888	384	582	2 923	1 959	743	1 187
1972	4 055	405	685	2 966	1 841	893	1 322
1973	4 674	396	790	3 488	1 997	1 034	1 644
1974	4 605	438	778	3 390	1 922	1 064	1 620
1975	3 841	362	672	2 808	1 509	838	1 494
1976	3 926	337	666	2 923	1 469	1 002	1 455
1977	4 325	370	750	3 205	1 437	1 101	1 787
1972							
1st qtr	965	100	158	708	452	209	305
2nd	1 016	102	164	750	461	220	336
3rd	1 015	94	176	745	446	230	339
4th	1 059	109	187	763	482	234	343
1973							
1st qtr	1 167	103	192	872	527	250	390
2nd	1 157	98	197	862	504	245	409
3rd	1 158	95	206	858	504	268	386
4th	1 192	100	196	896	462	271	459
1974							
1st qtr	1 224	118	190	917	520	278	426
2nd	1 160	107	192	861	484	267	408
3rd	1 117	112	186	819	475	260	382
4th	1 104	101	211	793	443	258	403
1975							
1st qtr	967	98	158	711	394	221	353
2nd	967	92	167	708	392	201	374
3rd	967	87	171	709	367	201	399
4th	940	85	175	680	357	215	368
1976							
1st qtr	936	82	164	689	371	227	338
2nd	972	83	182	706	367	252	353
3rd	1 005	86	160	759	369	263	372
4th	1 014	86	160	769	361	261	392
1977							
1st qtr	1 030	81	184	765	347	263	420
2nd	1 044	92	183	769	332	274	439
3rd	1 103	97	197	809	374	287	442
4th	1 149	101	186	862	385	277	487
1978							
1st qtr	1 169	90	201	878	361	304	504
2nd	1 172	92	206	874	374	304	494

[1] See footnote to table 1. [2] Including leasing, on the basis of the ownership of assets.

Table 4 Fixed capital expenditure at current prices of manufacturing, distributive and service industries

£ million

Period	Total	Manufacturing industry	Distributive and service industries (excluding shipping)	Shipping industry
1966	2 787	1 517	1 172	99
1967	2 861	1 485	1 236	140
1968	3 304	1 639	1 418	247
1969	3 629	1 822	1 589	217
1970	4 294	2 130	1 799	364
1971	4 648	2 187	2 078	384
1972	4 971	2 044	2 373	553
1973	6 071	2 347	3 090	635
1974	7 360	3 067	3 682	611
1975	7 929	3 522	3 841	565
1976	8 841	3 958	4 497	386
1977	11 033	4 862	5 611	560
1973				
1st qtr	1 455	555	734	166
2nd	1 378	521	738	118
3rd	1 464	612	743	109
4th	1 775	659	875	242
1974				
1st qtr	1 673	693	890	90
2nd	1 684	688	871	125
3rd	1 848	776	899	173
4th	2 155	910	1 022	223
1975				
1st qtr	1 895	860	893	142
2nd	1 890	832	920	138
3rd	1 989	869	972	148
4th	2 155	961	1 056	138
1976				
1st qtr	2 034	918	1 020	96
2nd	1 999	893	1 053	53
3rd	2 274	997	1 130	146
4th	2 534	1 150	1 293	92
1977				
1st qtr	2 491	1 106	1 263	122
2nd	2 498	1 101	1 284	114
3rd	2 792	1 233	1 414	145
4th	3 251	1 421	1 651	180
1978				
1st qtr	3 018	1 322	1 584	112
2nd	3 022	1 366	1 576	80

visional estimate. In this fluctuating series, the expenditure in the first half of 1978 was appreciably lower than in the second half of 1977.

Notes

1 The estimation of changes in the volume of capital expenditure (as distinct from changes at current prices) is subject to greater error when the rate of price increases is varying, and this should be borne in mind when using the figures.

2 The figures in the accompanying tables are on the new 1975 price basis used for the first time in the publication of the provisional results (*Trade and Industry*, 2 September).

Inquiries: Manufacturing industry 01-215 3175/3176. Distribution and service industries 01-215 3345.

Index to statistics

Published each week at end of the statistics section

Estimates of investment in assets for leasing, hiring and renting out

The estimates of investment in 1977 for assets for leasing, hiring and renting out indicate a substantial rise compared with the corresponding expenditure in the previous year, from a total of £619 million in 1976 to £941 million, at current prices. The figures given in tables 1 and 2 below have been compiled from three sources.

The main source has been the extension from the first quarter of 1975 of the Department of Industry's quarterly inquiry into capital expenditure by the manufacturing, distributive and service industries, the results of which regularly appear in *Trade and Industry* (see page 739).

The new approach was mainly directed to the larger leasing subsidiaries of banks, finance houses and specialist leasing companies.

Secondly, figures of the investment by the banks have been provided by the Bank of England from its quarterly survey. Thirdly, estimates for the remaining businesses have been derived using aggregates provided and calculated by the Business Statistics Office from information collected, on a sample basis, in annual inquiries for 1975-77. Since full information from the annual inquiry for 1977 is not yet available, the figures for that year are provisional.

The estimates do not include the hiring of contractors' plant and scaffolding, which is classified to the construction industry [1]. Tv rental in the retail sector and the leasing of building acquisitions by property companies are also excluded. In the *National Income Blue Books* [2], capital expenditure is classified according to industry of ownership, and expenditure by lessors is allocated to the group of industries: insurance, banking, finance and business services, on the basis of the ownership of the assets. As a special case, all investment in ships is classified in the *Blue Books* to the shipping industry, but the tables in this article include the relevant figures for ships.

It is difficult to make an accurate assessment of the movement in the relevant prices during the period of consideration, because the relative proportions of the different types of asset may have changed appreciably; this reservation applies particularly to the estimates for plant and machinery. However, very approximately, and in aggregate terms, it appears that investment at constant (1975) prices increased only slightly between 1975 and 1976, but rose by more than one-third between 1976 and 1977. The estimates are given in table 2.

[1] See Business Monitor series PA 500 (HMSO).

[2] The latest *Blue Book* was published on 19 September (see page 750).

There is a good deal of interest in the analysis of leased assets according to type of lease and sector of lessee, and some information has been collected about these aspects. An important category of leasing is that carried out under financial lease (full payout agreement) in which the full cost of the asset is recovered by the lessor within a fixed (contractual) period, which may be followed by a further period of unspecified length. In other types of leasing, hiring or renting out, the assets may be used for shorter periods by various lessees.

The Department of Industry's form of return was therefore designed to collect some information about the broad classification of those lessees who obtained assets under financial lease. Where contributors were unable to provide this breakdown of their figures, their financial leasing has been allocated to the residual category 'All other leasing, hiring or renting out'. The proportion of financial leasing so classified has varied somewhat, so that comparisons over time are not strictly valid. In 1977, as table 1 shows, well over £200 million (acquisitions less disposals) was identified to lessees in manufacturing industry.

The residual category ('All other leasing, hiring or renting out') also includes assets under operating leases, in which rentals payable by lessees in the primary period are not expected to be sufficient to amortise the lessor's capital investment in the equipment. It follows that the equipment can be leased to more than one lessee during its useful life and that the periods of the lease can vary from day-to-day leases to annual leases. Data from the surveys conducted by the Bank of England and from the annual inquiries by the Business Statistics Office are also included in the residual category.

Inquiries: 01-215 3345.

Table 1 Capital expenditure from 1975 to 1977 on assets for leasing, hiring or renting out [1]

£ million, current prices

	Financial leasing to:			All other leasing, hiring or renting out [3]	Totals
	General Government [2]	Manufacturing industry	Other industries		
New building work:					
1975	—	—	—	5	5
1976	—	—	—	5	5
1977 p	—	—	—	7	7
Vehicles: [4]					
Acquisitions					
1975	7	20	58	36	121
1976	9	22	124	41	196
1977 p	10	55	132	76	273
Disposals					
1975	—	4	3	7	14
1976	—	5	7	9	21
1977 p	—	4	5	13	22
Plant and machinery:					
Acquisitions					
1975	39	102	67	203	411
1976	40	143	78	208	469
1977 p	35	184	146	370	735
Disposals					
1975	—	4	2	10	16
1976	1	6	8	15	30
1977 p	2	14	11	25	52
Total expenditure:					
Acquisitions					
1975	46	122	125	244	537
1976	49	165	202	254	670
1977 p	45	239	278	453	1 015
Acquisitions *less* disposals					
1975	46	114	120	227	507
1976	48	154	187	230	619
1977 p	43	221	262	415	941

[1] Capital expenditure by banks, leasing subsidiaries of banks, finance houses and specialist leasing companies. [2] Central government and local authorities. [3] Includes some financial leasing for which information about lessees was not available. The proportion of such leasing varies between years, so that comparisons are not strictly valid. [4] Includes ships. p Provisional.

Table 2 Aggregate capital expenditure, 1975-77, on assets for leasing, hiring or renting out: at current prices and constant (1975) prices

£ million

	New building work	Vehicles [1] [2]	Plant and machinery [1] [3]	Totals [1]
1975				
Current prices	5	107	395	507
1975 prices	5	107	395	507
1976				
Current prices	5	175	439	619
1975 prices	4	146	380	530
1977 p				
Current prices	7	251	683	941
1975 prices	6	171	540	717

[1] Acquisitions *less* disposals. [2] Includes ships. [3] The estimates at 1975 prices must be regarded as subject to a considerable range of error; see text. p Provisional.

Manufacturers' and distributors' stocks: second quarter

Revised figures indicate that the level of stocks held by manufacturers, wholesalers and retailers rose by about £300 million, at 1975 prices, seasonally adjusted, in the second quarter of 1978, £25 million more than provisionally estimated.

Manufacturing industry

Revised figures indicate that manufacturers' stocks rose by about £210 million at 1975 prices, seasonally adjusted, in the second quarter of 1978. This rise is slightly more than the provisional estimate due to upward revisions to the levels of work in progress (£35 million more) and stocks of finished goods which were only partially offset by a downward revision to the level of stocks of materials and fuel, which is now estimated to have fallen by about £15 million in the quarter. Work in progress rose by about £95 million and stocks of finished goods by about £140 million.

There were large increases in stocks of the food, drink and tobacco and the engineering industries, equivalent to about 3 per cent and 2 per cent respectively of opening levels; they more than accounted for the rise in manufacturing as a whole as the other industry groups all showed small decreases.

As the index of production on a 1975 basis is now available for 1973 onwards, the rebased stock/output ratio (fourth quarter of 1974 = 100) is published in table 5. For the first time it includes the relationship of stocks of each asset to manufacturing production. Despite the increase in stocks the total stock/output ratio fell during the quarter from 100.0 to 99.5 due to the rise of about 1½ per cent in manufacturing output. Over the past year the overall ratio has hardly changed but the materials and fuel ratio has fallen while the work in progress and finished goods ratios have risen.

Distributive industries

Revised figures indicate that wholesalers' stocks fell by about £40 million, at 1975 prices, seasonally adjusted, in the second quarter of 1978, a fall of £25 million more than provisionally estimated. Appreciable reductions in stocks held by general wholesale distributors and dealers in industrial materials and machinery were only partly offset by an increase in the stocks held by dealers in coal, builders materials, etc. Retailers' stocks rose by about £130 million, at 1975 prices, seasonally adjusted, in the second quarter.

Notes

1 The figures in the accompanying tables are on the new 1975 price basis used for the first time in the publication of the provisional results (*Trade and Industry*, 2 September). The retailers' stocks figures have been further revised to take account of new seasonal adjustment factors.

2 The estimation of physical changes in stocks is subject to greater uncertainty when the rate of price increase is varying and this should be borne in mind when using the figures.

Inquiries: Manufacturing industry 01-215 3175/5215. Distributive industries 01-215 3345.

Notes to tables 1 to 4

1 The analysis by industry group follows the Standard Industrial Classification (1968 edition):
Manufacturing orders III to XIX.
Distributive trades order XXII:
Wholesale MLH 810, 811, 812, 831, 832 (except leasing by finance houses)
Retail MLH 820, 821.

2 Book values exclude VAT. Purchase tax payable on retailer's stock prior to the second quarter of 1973.

3 The estimates are shown to the nearest £ million but should not be regarded as accurate to this degree and care should be taken in using the industry figures in tables 2 and 3 because of the margin of error involved in quarterly seasonal adjustments. Differences between totals and the sum of constituent parts are due to rounding.

r Revised. p Provisional.

Table 1 Value of physical increase in industry's stocks at 1975 prices seasonally adjusted

£ million

	Total	Manufacturing	Wholesaling	Retailing
Level of stocks at end 1977	27 982	20 261	4 540	3 181
1967	229	119	31	79
1968	814	530	160	124
1969	789	600	131	58
1970	805	616	202	−13
1971	−47	−277	218	12
1972	−77	−279	173	29
1973	2 392	1 336	432	624
1974	1 469	1 288	361	−180
1975	−1 570	−1 221	−249	−100
1976	460	316	131	13
1977	737	442	266	29
1973				
1st qtr	719	465	115	139
2nd	691	303	74	314
3rd	501	307	119	75
4th	480	261	123	96
1974				
1st qtr	−149	−173	87	−63
2nd	775	566	156	53
3rd	750	782	62	−94
4th	93	113	56	−76
1975				
1st qtr	−395	−206	−84	−105
2nd	−457	−255	−107	−95
3rd	−502	−498	−45	40
4th	−215	−262	−13	60
1976				
1st qtr	73	23	43	7
2nd	−123	−46	−10	−67
3rd	210	83	81	46
4th	299	255	17	27
1977				
1st qtr	466	267	82	117
2nd	262	79	179	4
3rd	−157	−18	−80	−59
4th	167	115	85	−33
1978				
1st qtr	214	71	81	62
2nd	302	215	−41	128

Table 2 Value of the physical increase of stocks held by manufacturing industry at 1975 prices seasonally adjusted

£ million

	Analysis by industry group							Analysis by type of asset		
	All manufacturing industries	Food, drink and tobacco	Chemicals, coal and petroleum products	Metal manufacture	Engineering, shipbuilding, vehicles and metal goods	Textiles, leather and clothing	Other manufacturing industries	Materials and fuel	Work in progress	Finished goods
Level of stocks at end 1977	20 261	2 479	2 443	1 813	9 772	1 520	2 235	7 362	7 370	5 529
1967	119	57	15	−82	219	−68	−22	−29	244	−96
1968	530	16	174	83	112	59	97	220	198	112
1969	600	55	181	−31	124	134	138	194	43	363
1970	616	17	103	98	400	—	−2	234	215	167
1971	−277	17	39	14	−311	−29	−8	−291	−170	184
1972	−279	34	3	−89	−162	−95	30	−88	58	−248
1973	1 336	152	251	60	595	75	203	829	544	−38
1974	1 288	261	403	7	459	19	138	658	53	577
1975	−1 221	−360	−285	21	−207	−96	−295	926	−272	−23
1976	316	16	97	236	−80	−3	51	−65	222	159
1977	442	160	−84	−37	275	30	98	−18	196	264
1973										
1st qtr	465	12	61	48	228	12	105	217	245	3
2nd	303	22	89	16	124	18	34	249	66	−11
3rd	307	64	97	5	81	21	40	188	150	−32
4th	261	54	5	−9	162	25	25	175	84	3
1974										
1st qtr	−173	95	274	−216	−132	−53	−141	293	−104	−363
2nd	566	130	36	64	141	58	137	80	130	356
3rd	782	91	155	119	264	25	128	290	109	383
4th	113	−55	−62	40	185	−10	15	−5	−83	201
1975										
1st qtr	−206	−96	−106	94	18	−31	−85	−289	−51	134
2nd	−255	−122	−48	21	7	−33	−80	−157	−63	−35
3rd	−498	−106	−89	−79	−101	−34	−88	−340	−94	−64
4th	−262	−35	−43	−16	−130	4	−42	−140	−64	−58
1976										
1st	23	−17	12	−5	13	21	−2	−88	62	49
2nd	−46	−13	27	51	−91	−17	−2	−48	21	−19
3rd	83	−20	19	90	−29	−5	28	47	36	—
4th	255	65	40	100	26	−3	27	24	103	128
1977										
1st qtr	267	14	9	38	137	12	58	90	141	35
2nd	79	41	−47	−1	12	31	41	−39	−84	201
3rd	−18	77	−56	−32	6	−6	−7	−23	−35	40
4th	115	29	11	−42	119	−8	6	−47	175	−13
1978										
1st qtr	71	52	37	−85	12	3	51	−28	37	62
2nd	215	76	−20	−5	213	−23	−25	−17	94	138

Table 3 Value of the physical increase of stocks held by wholesalers at 1975 prices seasonally adjusted

£ million

	Total wholesalers	General wholesale distributors	Dealers in coal, builders materials etc	Dealers in industrial materials and machinery
Level of stocks at end 1977	4 540	2 890	349	1 302
1967	31	17	1	14
1968	160	107	9	44
1969	131	81	3	47
1970	202	48	5	149
1971	218	181	−3	40
1972	173	147	29	−3
1973	432	433	4	−6
1974	361	213	15	133
1975	−249	−255	−26	32
1976	131	117	12	2
1977	266	158	−3	111
1973				
1st qtr	115	108	−16	23
2nd	74	80	15	−21
3rd	119	124	5	−9
4th	123	122	1	1
1974				
1st qtr	87	91	−6	3
2nd	156	101	13	43
3rd	62	9	—	53
4th	56	13	9	34
1975				
1st qtr	−84	−104	1	19
2nd	−107	−108	−12	13
3rd	−45	−24	−10	−11
4th	−13	−19	−5	11
1976				
1st qtr	43	43	19	−18
2nd	−10	45	−13	−41
3rd	81	26	9	47
4th	17	4	−3	15
1977				
1st qtr	82	55	8	20
2nd	179	45	14	121
3rd	−80	4	−44	−41
4th	85	54	20	11
1978				
1st qtr	81	63	−37	55
2nd	−41	−28	21	−34

Table 4 Increase in the book value of manufacturers' and distributors' stocks

£ million

	Total	Manufacturing	Wholesaling	Retailing
Level of stocks at end 1977	39 613	28 771	6 425	4 417
1967	280	180	47	51
1968	874	581	138	152
1969	985	766	134	113
1970	1 302	1 038	207	102
1971	764	471	264	133
1972	949	618	298	114
1973	3 699	2 425	793	481
1974	6 335	4 978	938	419
1975	3 054	2 259	348	447
1976	6 200	4 591	1 143	466
1977	5 094	3 578	898	618
1973				
1st qtr	681	459	121	101
2nd	749	515	138	96
3rd	1 031	627	289	115
4th	1 237	824	244	169
1974				
1st qtr	1 771	1 469	243	59
2nd	1 834	1 388	264	182
3rd	1 532	1 221	239	72
4th	1 197	899	192	106
1975				
1st qtr	973	894	18	61
2nd	612	559	15	38
3rd	530	218	158	154
4th	940	588	158	194
1976				
1st qtr	1 124	877	192	55
2nd	1 219	1 014	214	−9
3rd	1 666	1 091	407	168
4th	2 191	1 610	329	252
1977				
1st qtr	2 104	1 527	281	296
2nd	1 334	936	273	125
3rd	696	408	222	66
4th	959	707	121	131
1978				
1st qtr	683	487	91	105
2nd	1 330	1 018	90	222

Table 5 Relationship of manufacturers' stocks to manufacturing production

Index numbers – fourth quarter 1974 = 100 Seasonally adjusted

Period (quarters)	Total stock levels (at 1975 prices)	Production (with 1975 net output weights)	Ratio of stocks to production: Total	Materials and fuel	Work in progress	Finished goods
1973						
1st qtr	90	102	87.7	83.1	93.2	87.7
2nd	91	103	88.2	85.0	93.0	86.5
3rd	93	104	88.7	86.3	94.1	85.0
4th	94	104	89.9	88.3	95.2	85.1
1974						
1st qtr	93	100	93.2	95.9	98.1	81.9
2nd	96	104	91.9	92.8	95.7	85.1
3rd	99	103	96.3	96.9	98.0	93.1
4th	100	100	100.0	100.0	100.0	100.0
1975						
1st qtr	99	99	99.9	97.4	100.2	103.5
2nd	98	95	103.2	99.9	103.9	107.6
3rd	95	94	101.7	96.6	103.5	107.3
4th	94	94	99.7	94.3	102.0	105.5
1976						
1st qtr	94	95	99.5	92.9	102.6	106.2
2nd	94	97	96.8	89.9	100.3	103.1
3rd	94	97	97.1	90.4	100.7	103.0
4th	96	99	97.0	89.5	100.8	104.1
1977						
1st qtr	97	99	97.6	89.8	101.9	104.0
2nd	97	98	99.4	90.7	102.2	109.6
3rd	97	99	98.4	89.6	100.9	109.4
4th	98	98	100.2	90.1	104.5	110.4
1978						
1st qtr	98	98	100.0	89.3	104.5	111.1
2nd	99	100	99.5	87.8	104.2	112.1

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Wool textile industry: output in June and exports in second quarter

The volume of production in the wool textile industry (as measured by the seasonally-adjusted index of production) in June 1978 was 2 per cent more than in June 1977. Statistics issued by the Wool Industry Bureau of Statistics show that in the period January to June 1978 woven fabrics (excluding blankets) were 4 per cent lower than the period January to June 1977; deliveries of worsted yarns (excluding semi-worsted yarn) were 7 per cent lower. Production of wool and hair tops was 10 per cent less and that of man-made fibre tops was 13 per cent less.

Inquiries: 01-212 0017 or 01-212 6474.

Output in the wool textile industry

	Consumption	Production			Deliveries			
	Raw wool (clean weight)	Tops		Woollen yarn [1]	Worsted yarn [2]	Woven fabrics (excluding blankets) [1]		Blankets [3]
		Wool and hair	Man-made fibres			Woollen	Worsted	
	million kg					million sq m		
1968	177.5	96.6	36.4	147.4	98.2	135.8	110.6	27.3
1969	174.5	92.0	42.2	142.2	100.5	130.1	109.2	26.9
1970	153.1	79.7	44.6	129.4	97.6	115.5	99.8	24.6
1971	141.2	66.2	36.6	130.7	93.0	101.9	83.9	28.5
1972	152.3	75.1	45.9	130.9	101.6	99.8	83.7	28.8
1973	136.6	62.2	55.9	135.2	100.0	104.0	88.4	30.6
1974	112.6	43.9	54.8	122.5	87.2	92.1	82.6	28.1
1975	110.6	46.8	44.4	112.1	75.5	76.8	74.6	24.7
1976	119.7	56.5	47.2	108.0	80.8	73.6	69.4	22.8
1977	113.5	52.3	45.3	105.7	81.2	78.8	71.3	22.2
1976								
1st qtr	31.0	13.8	11.6	29.4	20.6	16.9	18.2	6.5
2nd	30.5	14.5	12.1	27.9	20.3	19.6	16.9	4.4
3rd	27.6	13.4	10.6	23.7	18.2	19.4	16.9	5.2
4th	30.6	14.6	13.0	27.0	21.7	17.9	17.5	6.5
1977								
1st qtr	32.4	15.3	12.6	29.0	23.1	19.6	18.8	6.7
2nd	29.8	13.9	11.9	27.2	20.2	21.1	18.1	4.8
3rd	24.5	11.1	10.4	23.0	17.5	19.7	16.4	4.4
4th	26.8	12.0	10.4	26.5	20.4	18.4	18.0	6.2
1978								
1st qtr	29.5	13.6	10.6	27.7	20.8	18.5	17.3	5.8
2nd	28.4	12.8	10.8	27.2	19.6	21.6	16.8	4.8
1977								
January	10.3	5.0	4.0	9.0	7.2	5.8	5.9	2.4
February	10.2	4.8	4.0	9.1	7.5	6.2	6.0	2.2
March	11.9	5.5	4.6	10.8	8.4	7.6	6.9	2.1
April	9.6	4.6	3.8	8.6	6.4	6.6	5.7	1.7
May	11.1	5.2	4.7	10.0	7.6	7.4	6.6	1.6
June	9.1	4.1	3.4	8.6	6.2	7.1	5.8	1.5
July	7.9	4.2	3.9	6.5	5.6	6.0	5.2	1.1
August	7.6	2.9	2.9	8.4	5.4	6.5	5.2	1.6
September	9.0	4.0	3.6	8.2	6.5	7.2	6.0	1.7
October	9.1	3.9	4.4	9.2	7.1	6.9	6.4	2.0
November	9.7	4.5	3.6	9.5	7.4	6.7	6.5	2.1
December	8.0	3.6	2.4	7.8	5.9	4.8	5.1	2.1
1978								
January	9.7	4.5	3.0	9.3	6.9	6.0	5.8	2.2
February	9.5	4.5	3.1	8.8	6.7	5.9	6.0	1.5
March	10.3	4.6	4.5	9.6	7.2	6.6	5.5	2.1
April	9.7	4.4	3.2	9.2	6.9	6.8	5.5	1.8
May	9.3	4.2	4.1	8.8	6.4	6.9	5.4	1.5
June	9.4	4.2	3.5	9.2	6.3	7.9	5.9	1.5

Notes to table

[1] Estimated. [2] From January 1969 includes semi-worsted yarn: previously yarn of this type was not separately distinguished and the small quantities involved were divided between the worsted yarn headings. In June deliveries of semi-worsted yarn were 0.7 million kg. [3] Woven woollen fabrics include fabrics which are mainly woollen by weight of components and, similarly, woven worsted fabrics include fabrics which are mainly worsted by weight of components.

Exports of wool textile products

	Total	Wool tops [1]		Yarns		Woven fabrics [2]		Other wool textile products [3]
	£m	£m	Mn kg	£m	Mn kg	£m	Mn sq m	£m
1968	114.80	23.94	25.44	20.44	14.34	66.14	69.42	4.28
1969	125.41	26.55	26.01	23.32	16.08	71.08	69.46	4.45
1970	117.25	20.38	21.08	23.37	15.85	70.00	62.51	3.50
1971	106.82	16.28	18.66	23.28	15.88	62.57	54.30	4.70
1972	118.49	19.80	20.51	27.28	18.13	66.48	56.32	4.93
1973	172.32	38.06	21.36	36.95	18.28	91.08	60.39	6.24
1974	180.44	26.15	16.15	41.56	15.56	105.84	52.80	6.89
1975	165.22	28.53	16.19	37.42	13.83	92.08	43.33	7.20
1976	219.07	50.55	20.71	56.03	17.04	104.28	44.58	8.21
1977	294.82	56.92	17.43	77.53	18.02	151.29	51.81	9.08
1975								
1st qtr	36.93	5.19	4.04	8.33	3.07	21.79	10.43	1.62
2nd	42.17	6.97	3.30	9.36	3.54	24.27	10.77	1.57
3rd	41.80	7.98	4.47	8.66	3.17	23.76	11.86	1.40
4th	44.32	8.39	4.38	11.07	4.05	22.26	10.27	2.61
1976								
1st qtr	43.48	10.96	5.06	11.13	4.04	19.52	9.30	1.87
2nd	56.27	13.35	5.34	13.70	4.36	27.41	11.65	1.82
3rd	55.38	11.64	4.42	13.57	3.98	28.22	12.21	1.95
4th	63.94	14.59	5.89	17.64	4.66	29.14	11.42	2.57
1977								
1st qtr	71.46	18.02	5.43	20.04	5.02	30.89	11.91	2.51
2nd	75.23	15.83	4.84	19.89	4.65	37.18	12.74	2.33
3rd	75.83	11.69	3.52	17.81	3.94	43.46	14.28	2.87
4th	72.30	11.38	3.64	19.79	4.41	39.76	12.88	1.37
1978								
1st qtr	71.00	12.98	4.10	19.11	4.29	36.76	11.62	2.15
2nd	80.81	12.85	3.73	18.46	4.18	47.05	14.64	2.45

[1] From the first quarter 1976 figures are not strictly comparable with previous periods. [2] Excluding mechanical cloths from January 1970. [3] Wool or other animal hair, carded or combed; felts, wholly or partly of wool; blankets; travelling rugs; woollen and worsted felts; and other made-up textile articles, not individually specified in the export list, of sheeps' or lambs' wool or fine animal hair. Other commodities of, or containing, wool or animal hair not included in the table: sheeps' or lambs' wool and fine or coarse animal hair not carded or combed; noils, rags and other waste; carpets; garments; smallwares; knitted or crocheted fabrics; woven fabrics predominantly of man-made fibres containing sheeps' or lambs' wool or fine animal hair.

Carpet industry sales in June

The daily rate of carpet manufactures' sales by value in June 1978 at current prices was provisionally estimated to have been 13 per cent more than in June 1977 assuming 22 working days in June 1978 and 20 working days in June 1977. In the three months ended June 1978, the daily rate of manufacturers' sales was provisionally estimated to have been 17 per cent more than in the corresponding period 12 months ago assuming 63 working days in the period ended June 1978 and 61 working days in the period June 1977. The index numbers which are of manufacturers' sales by value, have been adjusted for the length of the working month, but not for non-statutory holidays or other seasonal factors. The wholesale price index of carpets is shown as a guide to the movement in prices.

Inquiries: 01-212 0017.

Index of carpet manufacturers' sales

1975 = 100

	Index of manufacturers' sales at current prices	Wholesale price index
1970	100	59.9
1971	115	62.0
1972	135	65.1
1973	166	73.4
1974	179	86.7
1975	202	100.0
1976	234	115.7
1977	255	134.7
1977		
2nd qtr	239	134.1
3rd	230	135.8
4th	292	139.2
1978		
1st qtr	270	145.8
2nd	280	147.0
1977		
March	269	131.2
April	251	133.4
May	227	134.5
June	241	134.5
1978		
March	288	146.6
April	288	146.8
May	281	146.8
June	272	147.3

Hosiery and other knitted goods: index of production in June

In the three months ended June 1978 the volume of production of hosiery and other knitted goods, seasonally adjusted (included knitted fabrics), was provisionally estimated to have been 2 per cent lower than in the three months ended June 1977.

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent years. The actual figures allow for differences in the length of calendar months, but not for other seasonal variations.

Inquiries: 01-212 0017 or 01-212 6474.

Hosiery and other knitted goods, including warp knitting 1975 = 100

1973	105	
1974	103	
1975	100	
1976	106	
1977	106	
	Actual	Seasonally adjusted
1976		
1st qtr	92	102
2nd	99	104
3rd	107	107
4th	124	109
1977		
1st qtr	97	107
2nd	98	104
3rd	108	108
4th	121	105
1978		
1st qtr p	92	104
2nd p	98	102
1977		
January	95	112
February	99	104
March	97	105
April	94	104
May	100	104
June	100	104
July	99	108
August	102	106
September	123	108
October	131	103
November	127	103
December	104	110
1978		
January p	87	102
February p	99	105
March p	91	104
April p	100	106
May p	92	99
June p	102	102

p Provisional.

Cotton industry: production in July

Statistics issued by the Textile Statistics Bureau show that in January-July 1978 the amount of cloth woven was 4 per cent lower than in January-July 1977. Production of single yarn decreased by 9 per cent and doubled yarn decreased by 16 per cent.

Inquiries: 01-212 0017/6474.

Production in the cotton industry

Annual totals and weekly averages

	Single yarn [1]		Doubled yarn		Woven cloth	
	Cotton yarn [2]	Spun man-made yarns and mixture yarn, inc. waste	Cotton yarn	Other	Cotton	Man-made fibre and mixtures
	million kg				million m	
1968	171.2	67.5	49.9	52.0	668.2	507.3
1969	166.2	73.2	46.8	60.9	661.5	538.1
1970	158.7	77.4	43.2	57.3	627.6	484.3
1971	133.0	83.3		85.0	559.1	479.8
1972	121.4	81.7		75.4	513.0	469.8
1973	115.4	92.5		82.1	453.2	502.3
1974	101.3	87.7		74.7	409.5	505.3
1975	94.4	76.4		68.4	405.4	503.0
1976	106.9	76.1		69.4	374.5	492.9
1977	98.1	77.6		69.8	368.3	497.5
1977						
Jan	2.2	1.7		1.5	7.7	10.3
Feb	2.3	1.7		1.6	7.9	10.7
Mar [3]	2.2	1.8		1.6	7.9	10.7
Apr	1.7	1.4		1.2	6.3	8.8
May	2.3	1.9		1.6	7.9	11.1
June [3]	1.5	1.2		1.1	6.9	8.8
July	1.6	1.2		1.2	4.3	7.5
August [3]	1.9	1.5		1.4	7.6	9.5
Sep	1.5	1.2		1.2	6.3	9.0
Oct	2.0	1.6		1.4	7.9	10.5
Nov [3]	2.0	1.6		1.4	7.8	10.2
Dec	1.4	1.1		1.0	5.9	7.6
1978						
Jan	2.0	1.5		1.3	7.7	10.0
Feb	2.0	1.6		1.3	8.0	10.0
Mar [3]	1.6	1.2		1.1	6.8	8.2
Apr	2.0	1.6		1.3	8.2	9.4
May [3]	1.8	1.6		1.2	7.5	8.7
Jun	1.4	1.3		1.0	8.2	8.8
July	1.6	1.3		1.1	4.6	6.6

[1] Spun in cotton industry. [2] Including yarns wholly of cotton waste and mixture yarn of cotton and cotton waste. [3] Average of five weeks.

Production of man-made fibres in July

In three months ended July 1978, the volume of production of man-made fibres, seasonally adjusted, was estimated to have been 3 per cent higher than in the three months ended April 1978. Total production by weight of man-made fibres in January-July 1978 was 1 per cent lower than in January-July 1977, output of continuous filament decreased by 7 per cent and staple fibre increased by 4 per cent.

Inquiries: 01-212 0017 or 01-212 6474.

Man-made fibre production Thousand tonnes

	Total	Continuous filament (singles)	Staple fibre
1968	539.1	241.8	297.4
1969	553.9	252.5	301.5
1970	599.4	257.6	341.9
1971	613.1	276.4	336.7
1972	626.5	264.0	362.5
1973	730.8	305.6	425.3
1974	627.6	271.0	356.6
1975	562.5	246.5	316.0
1976	618.4	270.7	347.7
1977	551.8	239.3	312.5
1976			
1st qtr	159.8	70.0	89.8
2nd	157.5	69.7	87.7
3rd	140.4	62.4	78.0
4th	160.7	68.6	92.1
1977			
1st qtr	154.9	67.2	87.7
2nd	150.8	63.9	86.8
3rd	131.0	55.2	75.8
4th	115.1	53.0	62.1
1978			
1st qtr	150.1	60.6	89.5
2nd	156.2	62.2	94.0
1977			
January	49.1	20.9	28.2
February	50.3	21.8	28.5
March	55.5	24.5	31.0
April	52.3	20.8	31.5
May	47.7	21.5	26.2
June	50.8	21.7	29.2
July	49.5	20.8	28.7
August	37.6	16.0	21.6
September	43.9	18.4	25.5
October	43.5	18.2	25.4
November	36.8	17.9	18.9
December	34.8	17.0	17.8
1978			
January	44.2	19.1	25.1
February	47.6	19.0	28.7
March	58.2	22.5	35.7
April	48.3	19.1	29.2
May	58.5	22.7	35.8
June	49.3	20.3	29.0
July	45.9	18.8	27.1

Source: Production stats: Man-made Fibres Producers Committee. Index of production: Department of Industry.

Index of the volume of production 1975 = 100

1973	129	
1974	111	
1975	100	
1976	110	
1977	98	
	Actual	Seasonally adjusted
1976		
1st qtr	114	111
2nd	113	109
3rd	100	106
4th	112	112
1977		
1st qtr	111	108
2nd	107	103
3rd	91	97
4th	82	82
1978		
1st qtr	106	102
2nd	108	105
1977		
January	102	106
February	116	109
March	116	111
April	110	105
May	100	100
June	110	104
July	101	107
August	78	93
September	94	92
October	88	86
November	83	80
December	75	81
1978		
January	92	95
February	107	100
March	117	112
April	102	97
May	118	118
June	106	99
July	94	100

Letters to the editor

Letters to the editor should be addressed to the Editor, *Trade and Industry*, Room 437, 1 Victoria Street, London SW1H 0ET, and *not* to HMSO.

Little change in UK eating patterns

There were only marginal changes in eating patterns in the UK and the total energy content of the nation's diet remained almost unchanged over this period, according to the latest estimates of food consumption per head published by the Ministry of Agriculture, Fisheries and Food [1].

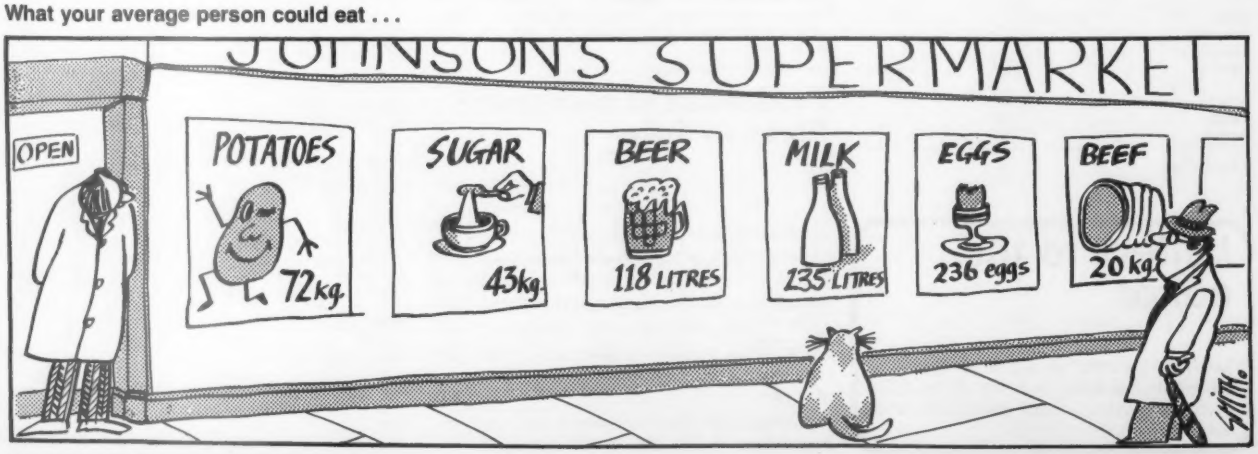
Between 1976 and 1977, higher consumption of meat, oils and fats, potatoes, honey and glucose were offset by lower consumption of fish, liquid milk, cheese, butter, fruit, vegetables and wheat flour. The demand for all drinks in 1977 was lower than during the hot summer of 1976; consumption of alcoholic drinks returned more or less to 1975 levels, while tea consumption at 3.2 kg per head, having fallen from 3.6 kg per head in 1976, was lower than at any time since the war. The extremely high prices of coffee in 1977 brought down consumption from 2.1 kg in 1976 to 1.7 kg in 1977. The following notes concen-

Table 1 Food supplies per head per annum moving into consumption in the United Kingdom (kg per head per annum)

	1974	1975	1976	1977
Dairy products (excluding butter)				
Liquid milk	143.4	146.3	144.3	139.2
(Litres per head per annum)	(139.5)	(142.3)	(140.4)	(135.4)
Of which school and welfare milk (litres)	(3.4)	(3.3)	(3.4)	(3.3)
Cream (40 per cent fat content)	1.6	1.6	1.5	1.5
Cheese	5.9	6.3	6.1	5.5
Evaporated milk, full cream, unsweetened	2.0	1.9	1.6	1.5
Condensed milk, full cream, sweetened	0.3	0.2	0.2	0.2
Condensed milk, machine skimmed	0.8	0.8	0.9	0.8
Dried whole milk	0.5	0.2	0.1	0.2
Dried skimmed milk	1.1	1.5	1.1	1.5
Yoghurt	1.5	1.6	1.7	1.8
Milk as liquid in manufactured products not elsewhere specified	7.6	6.1	5.8	5.6
Total (converted to milk solids)	25.9	26.7	25.5	24.9
Meat				
Beef – bone-in	19.7	21.4	18.7	18.7
Beef – bone out (expressed as bone-in equivalent) [1]	2.7	2.2	2.4	2.4
Mutton and lamb	7.7	8.3	7.6	7.0
Pork	12.0	10.3	10.2	11.5
Offal	3.4	4.0	3.7	3.9
Imported meat products	3.1	3.2	3.9	3.9
Bacon and ham	9.5	8.7	8.5	8.9
Poultry	11.6	11.4	11.5	11.4
Game and rabbits	0.2	0.2	0.1	0.1
Total (converted to edible weight)	57.0	57.0	54.7	55.7
Fish				
Fresh, frozen and cured (wet fillet equivalent)	6.4	6.1	6.5	5.7
Shell fish, fresh and frozen (edible weight)	0.6	0.6	0.7	0.5
Canned fish (imported)	1.0	1.2	1.2	1.2
Total (edible weight)	8.0	7.9	8.4	7.4
Eggs				
Shell eggs (number)	240	232	237	236
Eggs products (equivalent number of eggs)	16	14	11	12
Total	256	246	248	248
Oils and fats (visible)				
Butter	8.3	8.4	8.3	7.8
Margarine (gross)	4.9	5.0	5.8	6.5
(net) [2]	4.3	4.3	5.4	5.4
Lard and compound cooking fat	6.1	5.9	5.5	6.5
Other edible oils and fats	6.0	5.5	5.7	5.5
Total (converted to fat content)	22.6	21.8	22.4	22.7
Sugar and syrups				
Sugar refined [3]				
1 (gross)	47.9	42.8	42.9	42.6
2	45.8	40.6	40.8	40.5
3 (net)	43.9	39.0	38.9	38.6
Honey	0.2	0.4	0.3	0.4
Glucose	7.0	7.9	8.7	8.9
Total (Sugar content) (gross)	54.1	49.8	50.6	50.6
(net)	50.0	45.9	46.5	46.5
Fruit				
Fresh citrus fruit	9.4	9.3	9.2	8.8
Other fresh fruit	23.3	22.3	24.3	22.1
Canned fruit	7.1	6.8	6.6	6.0
Imported fruit juices (in natural strength)	4.1	3.9	3.7	3.7
Imported fruit pulp	0.7	0.7	0.9	1.1
Imported dried fruit	2.2	2.1	2.3	2.2
Total (converted to fresh equivalent)	55.9	53.7	56.2	52.9
Pulses and nuts				
Dried pulses [4]	2.9	3.1	3.2	3.0
Shelled nuts and soya flour	2.3	2.3	2.6	2.7
Total	5.2	5.4	5.8	5.7
Potatoes and potato products				
Potatoes	77.4	78.3	57.5	72.0
Potato products (Raw equivalent)				
Crisps	8.6	7.8	7.2	7.0
Frozen and par-fries	6.8	8.4	8.0	7.5
Canned and dehydrated	4.8	5.3	10.2	8.0
Pre-peeled	1.9	2.1	2.1	2.1
Total (raw equivalent)	99.5	101.9	85.0	96.6
Vegetables				
Fresh tomatoes	5.7	5.9	6.0	5.7
Imported canned tomatoes (including juice and puree)	4.4	2.9	4.0	4.4
Cabbage and greens	15.9	15.0	15.1	15.2
Leafy salads	2.1	2.2	2.1	2.1
Fresh carrots	5.2	5.0	5.9	6.0
Fresh legumes	11.7	8.1	8.3	8.7
Other fresh vegetables	13.9	14.3	16.4	16.0
Other canned vegetables [5]	4.6	4.7	4.9	4.0
Total (converted to fresh equivalent)	66.9	60.5	65.9	65.6
Grain products				
Wheat flour	61.6	64.5	66.2	65.3
Barley products	0.1	0.1	0.1	0.1
Oat products	1.4	1.4	1.4	1.4
Rye products	0.2	0.1	0.1	0.1
Breakfast cereals	3.6	3.5	3.9	3.9
Rice	1.5	1.5	2.1	2.1
Starch and other farinaceous foods	1.7	1.2	1.3	1.1
Total	70.1	72.3	75.1	74.0
Tea, coffee and cocoa				
Tea	3.5	3.5	3.6	3.2
Coffee (bean equivalent) [6]	2.1	2.2	2.1	1.7
Cocoa powder	0.4	0.3	0.3	0.2
Alcoholic drink [7]				
Spirits (proof litres) [8]	2.7	2.6	2.9	2.5
Beer (litres)	114.3	117.3	118.9	117.8
Wine (litres)	6.7	6.3	6.7	6.4
Energy value (per head per day) [9]				
Food (including coffee and cocoa) kJ	12 390	12 210	12 210	12 240
(kcal	2 960	2 920	2 920	2 920)
Alcoholic drink kJ	666	670	694	670
(kcal	159	160	166	160)
Population (millions) [10]	55.98	55.95	55.95	55.91

[1] To convert from product weight to bone-in equivalent a factor of × 1.30 is used. [2] Excluding ingredients shown as separate items elsewhere in the tables (eg butter and lard). [3] 1 Total consumption of sugar including sugar content of imported manufactured foods; 2 = (1) less sugar used in production of alcoholic drinks; 3 = (1) less sugar used in alcoholic drinks and sugar content of products covered elsewhere in the table to provide for the calculation of calories. [4] Includes dried beans and dried peas for canning. [5] Excludes canned dried peas, canned dried beans (beans in tomato sauce, etc) which are recorded under dried pulses and canned tomatoes, recorded above. [6] Includes coffee extracts and essences. [7] Quantities retained for home use, based on information provided by HM Customs and Excise. [8] Excludes medical spirit. [9] 1000 kilocalories (kcal) = 4184 kilojoules (kJ). [10] Applies to tables 1 to 4 only.

What your average person could eat . . .



trate on changes over the four-year period.

The consumption of dairy products reached a peak in 1975, with total supplies measured in terms of milk solids rising from 25.9 kg per head in 1974 to 26.7 kg in 1975, and falling to 24.9 kg in 1977. Within the group, this pattern was evident in consumption of liquid milk – up 2.8 litres in 1975 but down 4.1 litres over the four years, while cheese consumption at 5.5 kg in 1977 was at its lowest since 1970. Yogurt consumption, however, continued to rise over the four years – from 1.5 kg in 1974 to 1.8 kg per head in 1977.

Total meat supplies (as edible weight) recovered in 1977 from the 1976 level of 54.7 kg to 55.7 kg per head, but remained below the 1974 level of 57 kg per head per annum. Supplies of beef fell over the four-year period by 1.3 kg. Mutton and lamb showed the largest percentage decline within the meat group. Supply levels were 7.7 kg in 1974, peaked at 8.3 kg in 1975 and then fell to 7.0 kg per head in 1977 – a reduction of 10 per cent over the four years. Although still below the 1974 level of 12.0 kg per head, the decline in consumption of pork was halted in 1976, and recovered by 1.3 kg to 11.5 kg in 1977. Supplies of offal and imported meat products increased over the four years, offal from 3.4 kg in 1974 to 3.9 kg per head in 1977 and imported meat products from 3.1 kg to 3.9 kg per head, an increase of 25 per cent over the period. Consumption of poultry varied little over the four years but supplies of bacon and ham, like pork, have risen slightly from 8.7 kg per head in 1975 to 8.9 kg per head in 1977, while remaining below the 1974 level.

Consumption of fish fell from 8.0 kg in 1974 to 7.4 kg in 1977, a temporary recovery to 8.4 kg in 1976 being against the trend of the last 10 years.

Egg consumption, including egg products, fell sharply, by 10 eggs per head of population between 1974 and 1975 but has since remained fairly stable, rising slightly in 1976 and 1977 to 248 eggs per head.

Total supplies of oils and fats (including butter) rose marginally over the four-year period. Within this group margarine consumption has continued to increase, mainly at the expense of butter. After holding steady for three years (1974 to 1976), butter supplies fell from 8.3 kg to 7.8 kg per head, while total supplies of margarine increased from 5.8 kg to 6.5 kg per head.

Lard and compound cooking fats showed the greatest fluctuation. After a peak of 6.1 kg in 1974 (the highest since 1965), consumption fell over the following two years, only to rise even higher to 6.5 kg in 1977.

The sugar content of sugar and syrups in 1974, at 50 kg was the highest level recorded since 1964. Overall supplies then fell to 45.9 kg in 1975, recovering to 46.5 kg in 1976 and 1977. The most significant change in this group has been the increase in supplies of glucose, which rose from 3.9 kg in 1964 to 7.0 kg in 1974 and to 8.9 kg in 1977.

Total fruit supplies (as fresh equivalent) continue to fluctuate, reflecting changes in home production, falling from 55.9 kg in 1974 to 52.9 kg per head in 1977, with reductions in home-grown and imported fresh fruit, canned fruit and imported fruit juices.

Total supplies of potatoes and potato products (expressed as raw equivalent) are still recovering from the effects of the shortage of home-grown potatoes in 1976, when total consumption fell to 85.0 kg, from 101.9 kg per head the previous year, despite a consequential rise in supplies of imported potato products (consumption of canned and dehydrated potatoes almost doubled in 1976). The 1977 total of 96.6 kg per head was still below average levels for recent years. Overall supplies of other vegetables similarly reflected changes in home production falling from 66.9 kg in 1974 to 60.5 kg in 1975, mainly because of a drop in home-grown peas and beans and lower imports of canned tomatoes. Supplies recovered in 1976 and in 1977, reaching 65.6 kg per head.

Supplies of grain products fell by 1.1 kg per head in 1977 compared with 1976 at 74.0 kg per head, but remained well above the unusually low 1974 figure of 70.1 kg. As indicated in the first paragraph, consumption of non-alcoholic beverages remained comparatively stable between 1974 and 1976 but fell considerably in 1977, with tea consumption at a 34 year low of 3.2 kg compared with 3.5 kg per head in 1974, while coffee consumption at 1.7 kg, compared with 2.1 kg per head in 1974, was at its lowest since 1968.

Alcoholic drinks

Consumption of alcoholic drink, which rose during the hot summers of 1975 and 1976, fell slightly in 1977, although the underlying upward trend of recent years was maintained. The rise has been most marked in the consumption of beer – from just under 100 litres in 1969 to 117.8 litres in 1977. Recent increases in excise duties, however, may have affected consumption of spirits and wine which, apart from the exceptional thirsty year of 1976, fell during the four-year period.

Nutrient content of food supplies

While the total energy value of the food supply in 1977 remained virtually unchanged from 1976, the supplies of protein and especially animal protein declined slightly. This was because the increases in meat consumption were more than offset by decreases in milk, cheese and fish. The levels of most minerals and vitamins were also slightly lower than in 1976, although similar to those recorded in 1974. The major exception was vitamin C, supplies of which increased with the greater availability of fresh potatoes and some other vegetables.

Food products in the form purchased by household and caterers

Consumption per head of some of the major foods measured at the point of final sale is given in table 6. These foods are included in their ingredient form in the earlier tables: for example, the main ingredients of bread, cakes, and biscuits appear in table 1 as part of the totals shown for flour, sugar and fats. The estimates have been compiled from the information used in the preparation of the national accounts [2], and are based largely on the national food survey records with adjustments to take into account purchases by commercial and institutional caterers.

Purchases of bread continued to decline during the period of this report reaching 50.6 kg per head in 1977 compared with 52.6 kg in 1974, while those of flour increased from 9.2 kg per head in 1974 to 11.4 kg in 1977. Purchases

Table 2 Nutrient equivalent of supplies of food per head per day moving into consumption in the United Kingdom

		1974	1975	1976	1977
Food					
Protein:					
Animal	g	52.3	52.8	51.4	50.8
Vegetable	g	31.2	31.4	31.7	31.9
Total	g	83.5	84.2	83.1	82.7
Fat from all sources:					
Animal	g	105	104	102	103
Vegetable	g	27	26	28	27
Total	g	132	130	130	130
Fatty acids:					
Saturated	g	62.8	61.9	61.4	61.2
Monounsaturated	g	49.7	48.7	48.4	49.2
Polyunsaturated	g	13.4	13.0	13.6	13.7
Carbohydrate [1]:					
Animal	g	24	24	23	23
Vegetable	g	359	352	355	356
Total	g	383	376	378	379
Calcium	mg	1 110	1 150	1 130	1 110
Iron	mg	13.0	13.1	13.2	13.0
Vitamin A	iu	4 250	4 390	4 520	4 470
Vitamin A, retinol equivalents	µg	1 280	1 320	1 360	1 340
Thiamine	mg	1.71	1.67	1.66	1.68
Riboflavin	mg	1.94	1.98	1.94	1.93
Nicotinic acid [2]	mg	19.3	19.6	19.4	19.3
Nicotinic acid equivalents [3]	mg	34.4	34.6	33.7	33.7
Vitamin C	mg	100	95	96	103
Vitamin D	iu	113	111	120	115
Vitamin D	µg	2.82	2.76	2.99	2.86
Energy value	kJ [4]	12 390	12 210	12 210	12 240
	kcal	2 960	2 920	2 920	2 920
Alcoholic drinks (Not included in section above on food)					
Energy value	kJ [4]	665	670	694	670
	kcal	159	160	166	160

[1] Available carbohydrate expressed as monosaccharides. [2] Total nicotinic acid. [3] Available nicotinic acid plus the contribution from tryptophan. [4] 4148 kilojoules (kJ) = 1000 kilocalories (kcal).

Table 3 Nutrient equivalent of supplies of food per head per day moving into consumption in the United Kingdom (per 1000 kcal)

Food		1974	1975	1976	1977
Protein:					
Animal	g	17.7	18.1	17.6	17.4
Vegetable	g	10.5	10.8	10.9	10.9
Calcium	mg	376	394	388	379
Iron	mg	4.4	4.5	4.5	4.5
Vitamin A, retinol equivalents	mg	431	452	465	458
Thiamine	mg	0.58	0.57	0.57	0.58
Riboflavin	mg	0.66	0.68	0.67	0.66
Nicotinic acid equivalents	mg	11.6	11.9	11.6	11.5
Vitamin C	mg	33.8	32.5	33.0	35.2
Vitamin D	mg	0.95	0.95	1.02	0.98

of cakes decreased steadily from 8.1 kg in 1974 to 6.9 kg in 1977 while those of biscuits increased to 10.3 kg in 1977 compared with 10.1 kg in 1976 but were still lower by 0.2 kg than in 1974.

Purchases of all canned vegetables, following an appreciable increase in 1976 to 18.4 kg per head, fell to 17.8 kg in 1977 but were still higher than in 1974 and 1975. Frozen vegetables showed a steady increase in purchases reaching 6.0 kg per head in 1977 against 4.7 kg in 1974.

Following a substantial drop to 18.6 kg in 1975, purchases of sugar (as such) rose to 20.1 kg per head in 1976 but dropped slightly to 19.8 kg in 1977. Except for a decrease of about 1 kg in 1975, total purchases of chocolate and sugar confectionery remained fairly constant at about 12 kg per head over the rest of the period.

The long established upward trend in the purchases of soft drinks appears to have been halted in 1977 which shows a drop of 1.7 litres per head from 83.5 litres in 1976 to 81.8 litres in 1977, still 18 per cent above 1974. This drop, however, can be attributed to the long hot summer of 1976 when record quantities of soft drinks were purchased. Purchases of ice cream were also down in 1977 compared with 1976, probably for the same reason.

Inquiries: 01-839 7711 ext. 479.

[1] Estimates for the pre-war years, based on official figures for various periods between 1934 and 1939, and for the years 1940 to 1966 were published in the *Board of Trade Journal*, Vol 194, No. 3703, page 753; revised estimates for 1955 to 1972 were published in *Trade and Industry*, Vol 12, No. 9, page 459. A revised estimate for 1976 and provisional results for 1977 were published in *Trade and Industry*, Vol 32, No. 2, page 116. A longer time-series appeared in *Economic Trends* 294, April 1978, 'The Nation's Food – 40 years of change', L. J. Angel and G. E. Hurdle, Ministry of Agriculture, Fisheries and Food.

[2] 'National Accounts Statistics: Sources and Methods', ed. Rita Maurice, HMSO, 1978.

Table 4 Percentage of total energy supply derived from each major food group, and from protein, fat and carbohydrate [1]

	1974	1975	1976	1977
Dairy products (excluding butter)	13.2	13.5	13.1	12.6
Meat (including canned meat and bacon)	14.3	14.4	13.7	14.0
Oils and fats (including butter)	18.8	18.5	19.0	19.2
Sugar and syrups	18.2	17.0	17.2	17.2
Potatoes	5.3	5.4	4.6	5.2
Grain products	22.4	23.5	24.4	24.0
Other foods	7.8	7.7	8.0	7.8
Total	100.0	100.0	100.0	100.0
Protein	11.3	11.5	11.4	11.3
Fat	40.2	40.1	40.0	40.1
Carbohydrate	48.5	48.4	48.6	48.6

[1] Excludes energy derived from alcoholic drink.

Table 5 Factors for converting weight to common denominators in 1977

Dairy products (excluding butter) (to milk solids):	
Liquid milk	0.124
Cream (40 per cent fat content)	0.456
Cheese	0.66
Evaporated milk, full cream, unsweetened	0.31
Condensed milk, full cream, sweetened	0.31
Condensed milk, machine skimmed [1]	0.214
Includes: Condensed milk, unsweetened	0.20
Condensed milk, sweetened	0.26
Dried whole milk	0.95
Dried skimmed milk	0.95
Natural yoghurt	0.145
Meat (product weight to edible weight):	
Beef – bone in	0.83
Beef – bone out	1.00
Mutton and lamb	0.84
Pork	0.74
Offal	1.00
Imported meat products [1]	0.991
Includes: Canned corned meat	1.43
Canned pig products	0.90
Canned tongue	1.00
Canned and fresh sausages	0.75
Canned bacon and ham	0.80
Canned poultry	1.00
Other canned meat	0.75
Other meat products	0.80
Bacon and ham	0.89
Poultry [1]	0.70
Game and rabbits	0.81
Oils and fats (product to fat content):	
Butter	0.825
Margarine	0.815
Lard and compound cooking fat	0.99
Other edible oils and fats [1]	0.999
Includes: Dripping	0.99
Edible oils and fats	1.00
Cocoa butter	1.00
Sugar and syrups (product to sugar content):	
Sugar	1.00
Honey	0.77
Glucose [1]	0.860
Includes: Glucose liquid	0.82
Glucose powder	1.00
Fruit (product to fresh equivalent):	
Canned fruit	0.80
Imported fruit juices (in natural strength)	2.00
Imported fruit pulp	0.85
Imported dried fruit	4.00
Vegetables (product to fresh equivalent):	
Imported canned tomatoes (including juice and puree) [1]	1.427
Includes: Canned tomato puree and paste	2.50
Canned tomato juice	1.00
Other canned vegetables [1]	1.234
Includes: Canned carrots	1.15
Canned peas (fresh)	1.51
Canned other vegetables	1.10

[1] The commodities are composite items and the factors may vary from year to year with any change in the composition or proportion of the various foods included.

Methodology and assumptions

The figures are all national averages and represent not what any particular individual obtains but what, on average, is available to the UK population for consumption. Since they relate to total consumption by the population as a whole, they provide the means, not otherwise available, of comparing the overall food situation at different periods of time.

To arrive at an estimate of total food supplies moving into human consumption in the UK, supplies from all sources, that is home production plus imports, are assessed in each year. Deductions are made for exports, non-food uses and waste, and account is taken of changes in measured stocks.

Little information is available on changes in wholesalers' and retailers' stocks, and this may affect year-to-year comparisons of non-perishable foodstuffs. Exceptionally, in 1974 and 1975, an estimate was included of changes in 'pipeline' stocks of sugar. Average consumption per head is then obtained by dividing the resulting total by the estimated mid-year population of the UK. This is the main difference between these estimates and those of the national food survey committee, whose figures represent actual quantities of food entering private households in Great Britain, and contribute largely to the estimates shown in table 6.

Although this methodology is relatively straightforward, considerable difficulties are encountered in practice in measuring supplies, ensuring complete coverage and avoiding duplication. The estimation of the amounts of imports going for human consumption presents few problems, since these are well recorded, but information on home production comes from a variety of sources, such as agricultural census returns, sample surveys and information from processors of manufactured foods. In dealing with processed foodstuffs, consideration has to be given to the stage in manufacture at which the supply is to be measured: for example, as wheat, as flour, or as bread. It has been found from experience that the most convenient point at which to measure the product is the first stage of processing. Thus, in the example given, the supply would be the amount of flour produced. The figures therefore represent disappearance into distribution rather than final consumption.

Attempts are made to aggregate commodities in appropriate units wherever possible so that sub-totals can be shown: for example, in the dairy products group the total is shown in terms of milk solids. The factors used to group the commodities in 1977 are given in table 5. These may vary from year to year depending on changes in the composition or proportion of the various foods included in composite items and in the light of up-to-date information. The only aggregates for all foods are those given in terms of energy value (kilojoules or kilocalories) and nutrient content in tables 2, 3 and 4.

Table 6 Consumption per head of some processed foods as finally purchased by households and catering establishments (including institutional catering) [1]

kg per head per annum

	1974	1975	1976	1977 p
Bread	52.6	52.2	51.4	50.6
Flour (packets)	9.2	9.1	10.7	11.4
Cakes	8.1	7.6	7.1	6.9
Biscuits	10.5	9.9	10.1	10.3
Sugar (packets) [2]	21.8	18.6	20.1	19.8
Canned vegetables	17.6	17.3	18.4	17.8
Frozen vegetables	4.7	5.2	5.3	6.0
Chocolate confectionery	6.7	5.9	6.4	6.3
Sugar confectionery	5.5	5.3	5.6	5.9
Soft drinks (litre per head) [3]	69.3	78.0	83.5	81.8
Ice cream (litre per head)	4.8	5.4	5.6	4.8

[1] The ingredients of these foods are included in the quantities shown in table 1. [2] Excludes sugar content of manufactured foods. [3] Ready-to-drink equivalent.

What is Financial Statistics?

Financial Statistics is a monthly publication by the Central Statistical Office and the source of many figures used in articles by financial journalists and in stockbrokers' circulars. It brings together the key financial and monetary statistics of the United Kingdom.

Financial Statistics is the prime source of UK detailed quarterly *financial accounts*. These include all recorded financial flows between sectors of the economy and bring a sense of proportion to the statistics of the different types of financial institutions and the various savings media.

Financial Statistics contains *up-to-date information* on government accounts, public sector borrowing requirement, money stock, domestic credit expansion, company liquidity, interest rates and security prices.

An **Explanatory Handbook for Financial Statistics** is also available. It contains notes and definitions which add to the understanding of all the tables, and explains the relationship between them. The handbook is included in the annual subscription charge or can be obtained separately (£1.35 net).

Price £3.20 (by post £3.52). Annual subscription £43.91 including postage. From HMSO, PO Box 569, London SE1 9NH.

Index of average earnings in July

Average earnings of employees in Great Britain are estimated to have risen by 14.2 per cent between July 1977 and July 1978. This estimate is based on the monthly index for the whole economy, covering in total about 21 million employees, which was introduced from January 1976 (see table 1).

Table 1 Index of average earnings of employees in Great Britain
Whole economy (new) series, not seasonally adjusted

	Index Jan 1976 = 100	Percentage increase over 12 months
1977		
June	115.4	8.2
July [1]	117.0	8.5
August	115.7	7.3
September	116.6	7.7
October	117.9	8.7
November	120.1	8.6
December	121.7	9.4
1978		
January	121.5	9.5
February	122.7	10.5
March	125.0	10.4
April	127.2	12.4
May	129.4	12.6
June	133.1	15.4
July p	133.5	14.2

p Provisional.
[1] Revised figures. Substantial numbers of part-time ancillary workers with relatively low earnings are employed in Educational Services during term time only. Consequently, during term (eg June) their presence lowers overall average earnings as compared with holiday periods (eg July in some areas, and August). To smooth these temporary fluctuations, in compiling the July 1976 and 1977 whole economy indices, term-time information for the weekly-paid was used on those returns showing a marked drop in their employment. This special 'holiday month' procedure was discontinued after July 1977 and the treatment brought into line with the general treatment of other groups of employees where seasonal fluctuations occur. The July 1976 and 1977 whole economy figures have therefore been recalculated and are now directly comparable with the July 1978 figure.

In the production and certain other industries (table 2) employing in total about 11 million employees, and covered by the older series index introduced from January 1963, earnings increased by about 16.2 per cent over the 12 months to July.

Recent figures are:

Table 2 Index of average earnings in production industries and some services [1]
Older series

	Seasonally adjusted			Unadjusted index January 1970 = 100
	Index January 1970 = 100	Percentage increase: Over previous month	Percentage increase: Over previous 12 months	
1977				
December	304.8	1.4	10.6	304.8
1978				
January	306.3	0.5	10.2	306.5
February	311.2	1.6	11.5	311.0
March	314.8	1.2	11.2	317.3
April	325.7	3.4	14.8	325.9
May	327.2	0.4	14.5	330.9
June	334.0	2.1	16.6	336.6
July p	332.7	−0.4	16.2	338.0

p Provisional.
[1] Transport and communication (other than sea transport and postal services) and some miscellaneous services.

Indices of basic rates of wages
At the end of August 1978, nationally-negotiated basic weekly rates of wages of manual workers were on average 15.9 per cent higher than a year earlier. During August, the index of basic weekly rates increased for 264.4 to 265.3. Recent figures are:

	Indices, 31 July 1972 = 100		Percentage increases over previous 12 months	
	Basic weekly rates	Basic hourly rates	Basic weekly rates	Basic hourly rates
1978				
31 March	238.6	240.0	6.5	6.5
30 April	258.3	259.8	15.0	15.0
31 May	259.6	261.1	15.1	15.1
30 June	263.2	264.8	15.7	15.7
31 July	264.4	266.0	15.9	15.9
31 August	265.3	266.9	15.9	15.9

The indices only take account of changes in nationally-negotiated rates. The year-on-year increases consequently reflect that new national rates for engineering workers became effective in April 1978 after remaining unchanged from February 1976.

Inquiries: Watford 28500 ext. 319.

Release dates of economic statistics to be published in October

Information in the table is issued by the Central Statistical Office on behalf of the government Statistical Service and other organisations as a guide to the dates of publication of major economic series in October 1978. The dates are those which departments, or other organisations concerned, are aiming at, and would normally expect to meet. Exceptionally, there may be a delay resulting from unavoidable statistical problems of collection and compilation. Further inquiries about individual series should be addressed to the source named.

Publication date and series	Method and time of release	Source
October		
2 Mon		
CBI monthly trends inquiry (September)	PN	CBI
Retail sales (August – final)	PN	Department of Trade
Hire purchase and other instalment credit business (August)	PN	Department of Trade
Investment intentions of the manufacturing, distributive and service industries (1978 and 1979)		Department of Industry
3 Tues		
UK official reserves (September)	PN	HM Treasury
Capital issues and redemptions (during the month of September)	PN	Bank of England
5 Thurs		
Housing starts and completions (August)	PN	Department of the Environment
6 Fri		
Personal income, expenditure and savings (2nd qtr); gross domestic product (2nd qtr rev)	PN	CSO
9 Mon		
Wholesale price index numbers (September – prov)	PN	Department of Industry
10 Tues		
Central Government financial transactions (including borrowing requirements) (September)	PN	HM Treasury
UK banks' eligible liabilities, reserve assets, reserve ratios and special deposits (mid-September)	PN	Bank of England
Provisional figures of vehicle production (September)	PN	Department of Industry
London clearing banks' monthly statement (mid-September)	PN	CLCB
Appropriation account of industrial and commercial companies (2nd qtr)	PN	CSO
13 Fri		
Usable steel production (September)	PN	BSC/Bispa
Retail prices index (September)	PN	Department of Employment
Index of industrial production (August – prov)	PN	CSO
Balance of payments current account and overseas trade figures (September)	PN	Department of Trade/CSO
Buildings societies' receipts and loans (September)	PN	BSA
16 Mon		
Retail sales (September – prov)	PN	Department of Trade
17 Tues		
Cyclical indicators for UK economy (September)	PN	CSO
18 Wed		
Basic rates of wages and normal weekly hours (September)	PN	Department of Employment
Monthly index of average earnings (August)	PN	Department of Employment
19 Thurs		
Consumers' expenditure (3rd qtr – 1st preliminary estimate)	PN	CSO
UK banks' assets and liabilities and the money stock (mid-September)	PN	Bank of England
London dollar and sterling certificates of deposit (mid-September)	PN	Bank of England
20 Fri		
Sales and orders in the engineering industries (July)	*Trade and Industry*	Department of Industry
Construction – new orders (August)	PN	Department of the Environment
22 Sun		
Department for National Savings' monthly progress report (September)	PN	Department for National Savings
23 Mon		
New vehicles registrations (September)	PN	Department of Transport
24 Tues		
Unemployment (October – prov)	PN	Department of Employment
Unfilled vacancies (October – prov)	PN	Department of Employment
25 Wed		
Institutional investment (2nd qtr)	PN	CSO
Bricks and cement production (September)	PN	Department of the Environment
26 Thurs		
Car and commercial vehicle production (September – final)	PN	Department of Industry
Unemployment (September – final)	*Gazette*	Department of Employment
Employment in the production industries (August)	*Gazette*	Department of Employment
Overtime and short-time working in manufacturing industries (Aug)	*Gazette*	Department of Employment
Stoppages of work due to industrial disputes (September)	*Gazette*	Department of Employment
Quarterly estimates of employees in employment (June)	*Gazette*	Department of Employment
Energy trends	PN	Department of Energy
31 Tues		
CBI industrial trends survey (October)		

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PQ 416	Rope, twine, net for second quarter 1978
PQ 418	Lace for second quarter 1978
PQ 432	Leather goods for first quarter 1978
PQ 445	Women's and girls' light outerwear, lingerie, infants' wear, etc, for first quarter 1978
PQ 449.1	Corsets and miscellaneous dress industries for first quarter 1978
PQ 449.2	Gloves for first quarter 1978
PQ 469.1	Abrasives for second quarter 1978
PQ 475	Wooden containers and baskets for second quarter 1978
PQ 480	Packaging products for first quarter 1978
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SD 8	Instalment credit business of retailers for July 1978

Business Monitors in the production series and miscellaneous series, and certain monitors (nos. SD 1 to SD 9) in the service and distributive series, are available by annual subscription from Her Majesty's Stationery Office, PO Box 569, London SE1 9NH.

Copies of specific issues (including back issues can be ordered by post (payable in advance) from the library at the Business Statistics Office, Newport, Gwent NPT 1XG (tel. 0633 56111, ext. 2973; telex 497121 – answer back BSONPT G).

'Blue Book' for 1978 published

Details of the national income, expenditure and output of the UK for the years 1967 to 1977 are published in the 1978 'Blue Book', issued by the Central Statistical Office (HMSO, £4.95).

The national income 'Blue Book' is the standard work of reference for detailed information about the national accounts of the UK. The national accounts not only provide information about the main aspects of economic activity – production, consumption, incomes, savings, investments, etc – but are compiled and presented in a framework designed to bring out the inter-relationships between particular sectors of the economy.

Pointers from the 'Blue Book'

Gross national product increases by 1.75 per cent

The gross income of the UK (the gross national product) rose from £111 billion, in 1976 to £124 billion in 1977, an increase of slightly less than 12 per cent. Gnp per head of the population in 1977 amounted to about £2,220.

Most of the increases in gross national product in recent years has been due to increases in pay and prices. In real terms, the volume of goods and services produced in the UK as measured by the average measure of gross domestic product at constant 1975 prices increased by about 1.75 per cent between 1976 and 1977 following a rise of about 3 per cent in the previous year.

Income from employment accounts for 70 per cent of total domestic income

Income from employment, of which wages and salaries is the largest element, accounted for 70 per cent of total domestic income after providing for stock appreciation in 1977.

The share of employment incomes in total income fell in both 1976 and 1977 from a high point of 74 per cent in 1975, and in 1977 the share was around the average for the last 10 years.

Company profits, on the other hand, increased their share of total domestic income (again after deduction of stock appreciation) from about 6 per cent in 1975 to slightly under 7 per cent in 1976 and slightly under 9 per cent in 1977. This was still, however, lower than the share in the years up to 1974, the first year in which the share of company profits fell below 10 per cent.

What we earned and how we spent it

Total personal income (income from employment and self-employment, investment income and government benefits) increased 11.5 per cent before tax between 1976 and 1977. After tax and other deductions, personal disposable income rose by almost 13 per cent in reflection of the cuts in personal taxation during 1977. Savings, at around 14 per cent of disposable income, continued the high levels recorded since 1974.

After allowing for the effects of price changes, however, real personal disposable income fell by about 1.5 per cent between 1976 and 1977.

The pattern of consumers' expenditure in 1977 and five and 10 years previously is given in the table. In 1977, total consumer spending amounted to about £83.5 billion.

	Per cent of total expenditure		
	1967	1972	1977
Food (household expenditure)	21.5	18.6	19.5
Housing	12.1	13.2	15.4
Clothing and footwear	8.7	8.5	8.2
Alcoholic drink	6.8	7.3	7.8
Running costs of motor vehicles	4.8	5.3	5.9
Fuel and light	4.7	4.5	5.1
Catering (meals plus accommodation)	5.0	4.7	4.5
Tobacco	5.9	4.5	4.3
Travel	3.2	3.2	3.3
Durable goods:			
Cars and motor cycles	3.0	4.5	3.2
Radio, electrical and other durables	2.0	2.6	2.3
Furniture and floor coverings	2.3	2.4	2.1

Over the last 10 years, certain trends in the pattern of consumers' expenditure are apparent, most noticeably perhaps the fall in the share of expenditure on tobacco and a rise in the share taken by housing and by alcoholic drink (mainly due to increased expenditure on wines and spirits). Although the share of expenditure on durable goods is little changed over the last 10 years, this component of consumers' expenditure is volatile and a comparison between individual years can be misleading.

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Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 22 September 1978.

BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
BRITISH					
How To Score	BR/E 39752/24/9/83	29	20 September	Enterprise Pictures Ltd	Bowden Productions Ltd
What's Up Superdoc!	BR/E 39754/24/9/83	94	21 September	Entertainment Film Distributors Ltd	Blackwater Film Productions Ltd
The Legacy	BR/E 39755/24/9/83	102	22 September	Columbia-EMI-Warner Distributors Ltd	Pethurst Ltd
Watership Down	BR/E 39757/24/9/83	92	22 September	Cinema International Corporation (UK)	Nepenthe Productions Ltd
Valerie Singleton Introduces	BR/NQ 39758	18	22 September	Children's Film Foundation Ltd	Anvil Film and Recording Group Ltd
Keith Chegwin Introduces	BR/NQ 39759	22	22 September	Children's Film Foundation Ltd	Anvil Film and Recording Group Ltd
Movietone News 2572	BR/E 39596/24/9/83	8	22 September	British Movietonews Ltd	British Movietonews Ltd
COMMUNITY					
Living Venice	EC 39750/24/9/83	11	19 September	Miracle Films Ltd	General Films – Press and Film Service, Brussels
Bateau Mouche	EC 39751/24/9/83	11	19 September	Miracle Films Ltd	General Films – Press and Film Service, Brussels
The Cop In Blue Jeans	EC 39756/24/9/83	74	21 September	Entertainment Film Distributors Ltd	Cinemaster, Rome
FOREIGN					
Outrageous	F 39749	96	19 September	Miracle Films Ltd	The Film Consortium of Canada Inc, Toronto
Hooper	F 39753	99	20 September	Columbia-EMI-Warner Distributors Ltd	Warner Bros Inc, California

New companies registered in Northern Ireland in August

The number of new companies registered in Northern Ireland in August and nominal capital are as follows:

	August 1978	January to Aug. 1978	August 1977
Private companies limited by shares	68	519	45
Private unlimited companies	–	1	–
Public companies limited by guarantee not having a share capital	–	3	–
Private companies limited by guarantee not having a share capital	–	7	–
Private companies limited by guarantee having a share capital	–	–	–
Total nominal capital of companies incorporated	£2 880 600	£23 660 326	£1 112 300

AMENDMENTS TO THE REGISTER

The registration number of the film 'Depraved' registered on 31 May 1977, has been amended to EC 39172/5/6/82 and the maker to Contrechamp SA and Unite 3, Paris.

The playing time of the film 'A Piece Of The Action', F 39571, registered on 4 May 1978, has been amended to 111 minutes.

The playing time of the film 'Captain Scott Goes East', BR/E 39719/27/8/83, registered on 24 August 1978, has been amended to 25 minutes.

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(a) annually (m) monthly (q) quarterly Weekly statistics are not included

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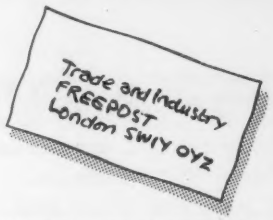

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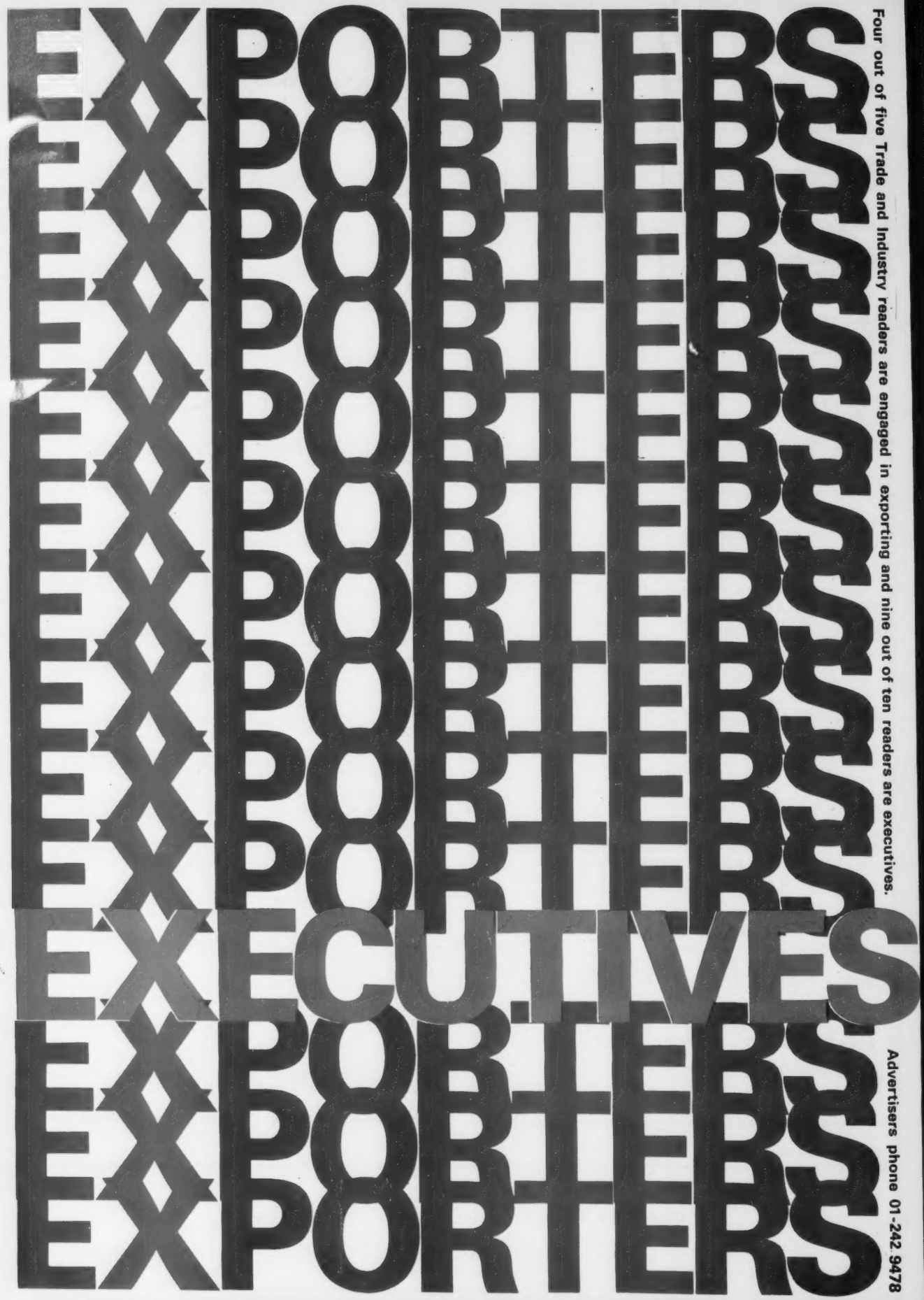

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